



# Guam Visitors Bureau

## Taiwan In-Market Insight Report

JUNE 2021

[ANTHOLOGY®]  
RESEARCH



# Background & Objectives

- In light of the covid-19 pandemic and its abrupt and severe impacts on visitor arrivals on Guam, Guam Visitors Bureau contracted Anthology Research to gather feedback from residents likely to travel in the near future from key source markets, in order to achieve the following objectives.
  - Inform strategies to drive demand for Guam as a destination for leisure travel from the source market covered by the study: Taiwan.
  - Better understand motivations to travel internationally.
  - Gauge perceptions of and satisfaction with Guam as a destination.
- Anthology and Guam Visitors Bureau research staff collaboratively developed the questionnaire, which was translated into Traditional Chinese.

# Methodology

- Anthology Research conducted a self-administered online survey of residents of Taiwan, utilizing sample provided by a reputable online sample provider. All surveys were presented in Traditional Chinese, with the option to view the survey in English. Participants were screened to include only those residents who have traveled internationally for vacation in the last two years or intend to travel internationally for vacation in the next two years.
- This report includes results from the survey, conducted June 16-18, 2021. A total of 307 surveys were collected during this period.
- The margin of error for a sample of 307 is +/- 5.59 percentage points with a 95% confidence level. That is, if all Taiwan residents in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.59 percentage points.

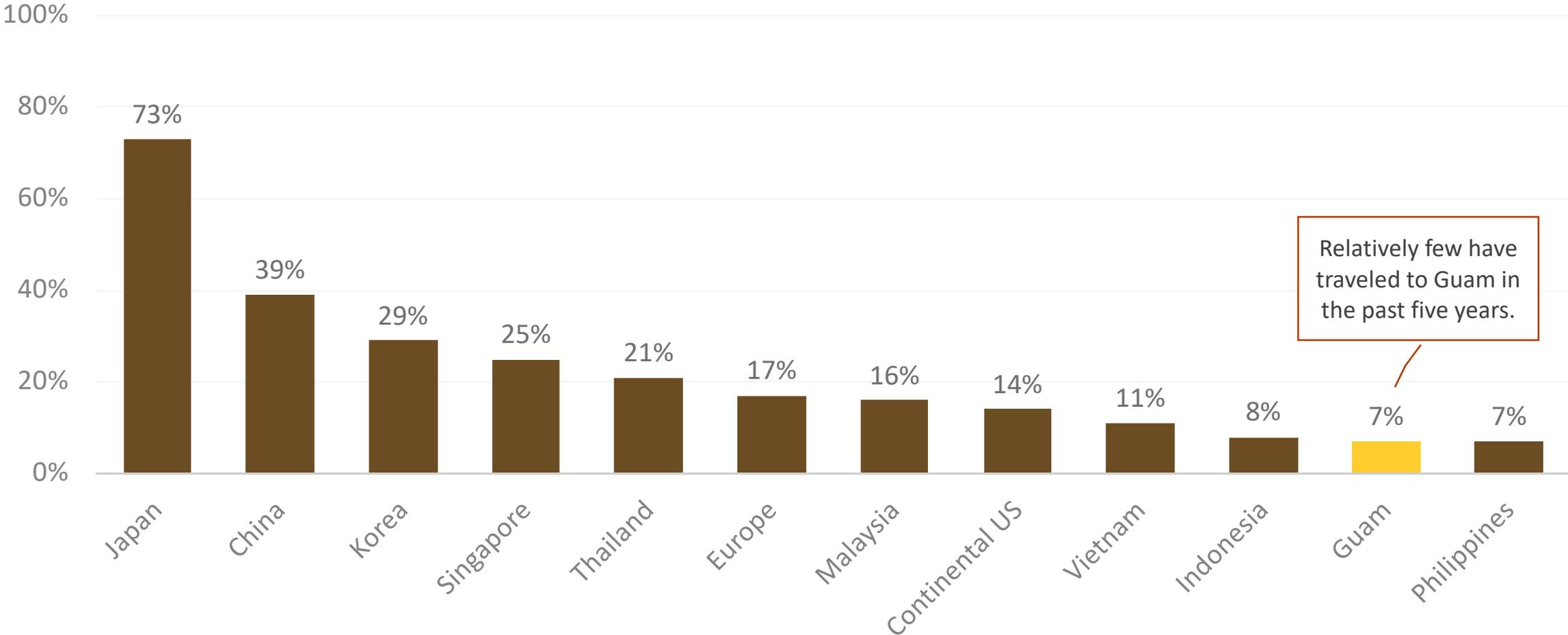




SECTION 1  
**TRAVEL PLANNING**



# TRAVEL HISTORY



Relatively few have traveled to Guam in the past five years.



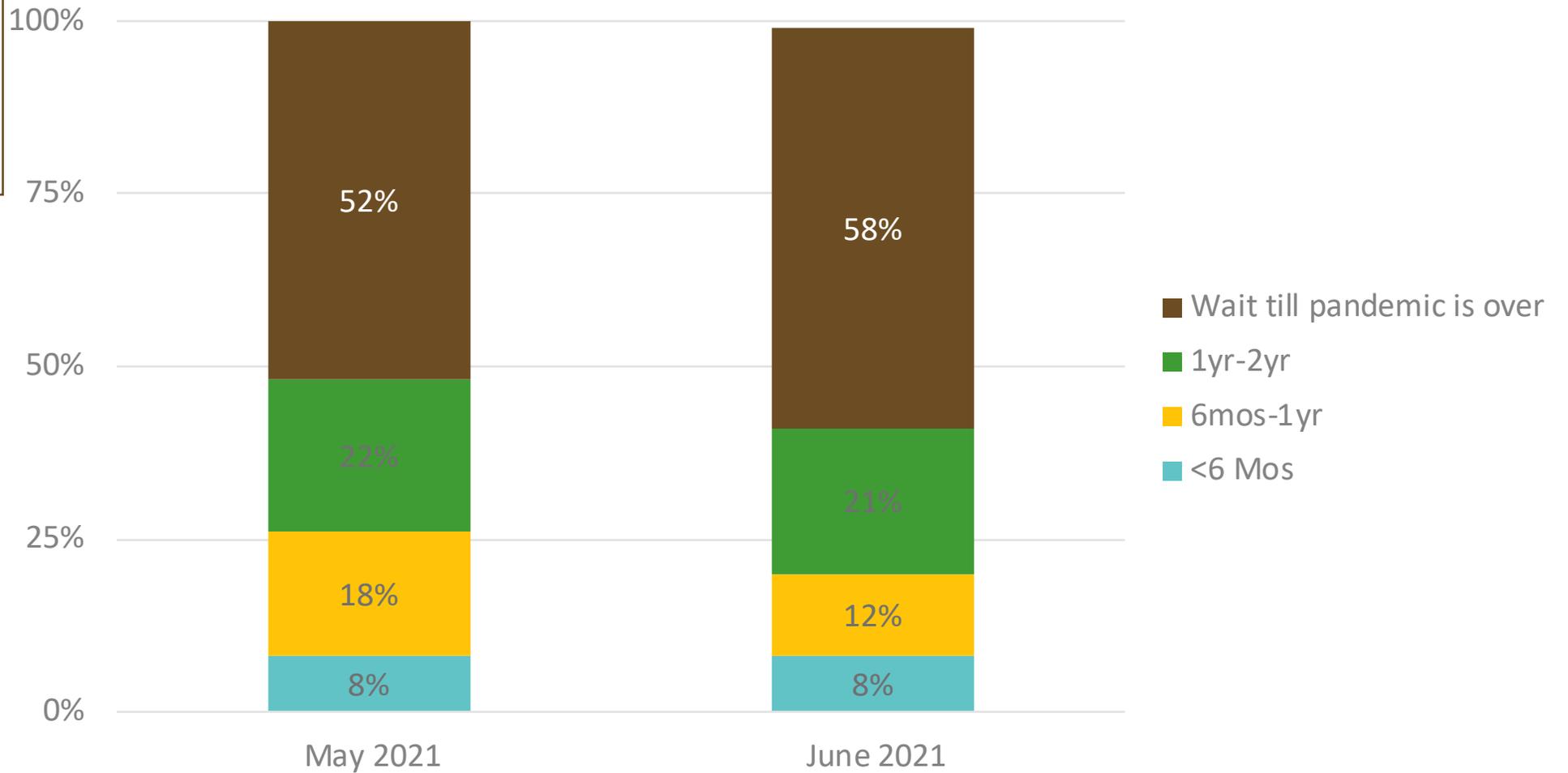
# TRAVEL HISTORY

	May 2021	June 2021
Japan	74%	73%
China	37%	39%
Korea	29%	29%
Singapore	23%	25%
Thailand	26%	21%
Europe	15%	17%
Malaysia	15%	16%
Continental U.S.	17%	14%
Vietnam	12%	11%
Guam	10%	7%
Indonesia	8%	8%
Hawaii	8%	6%

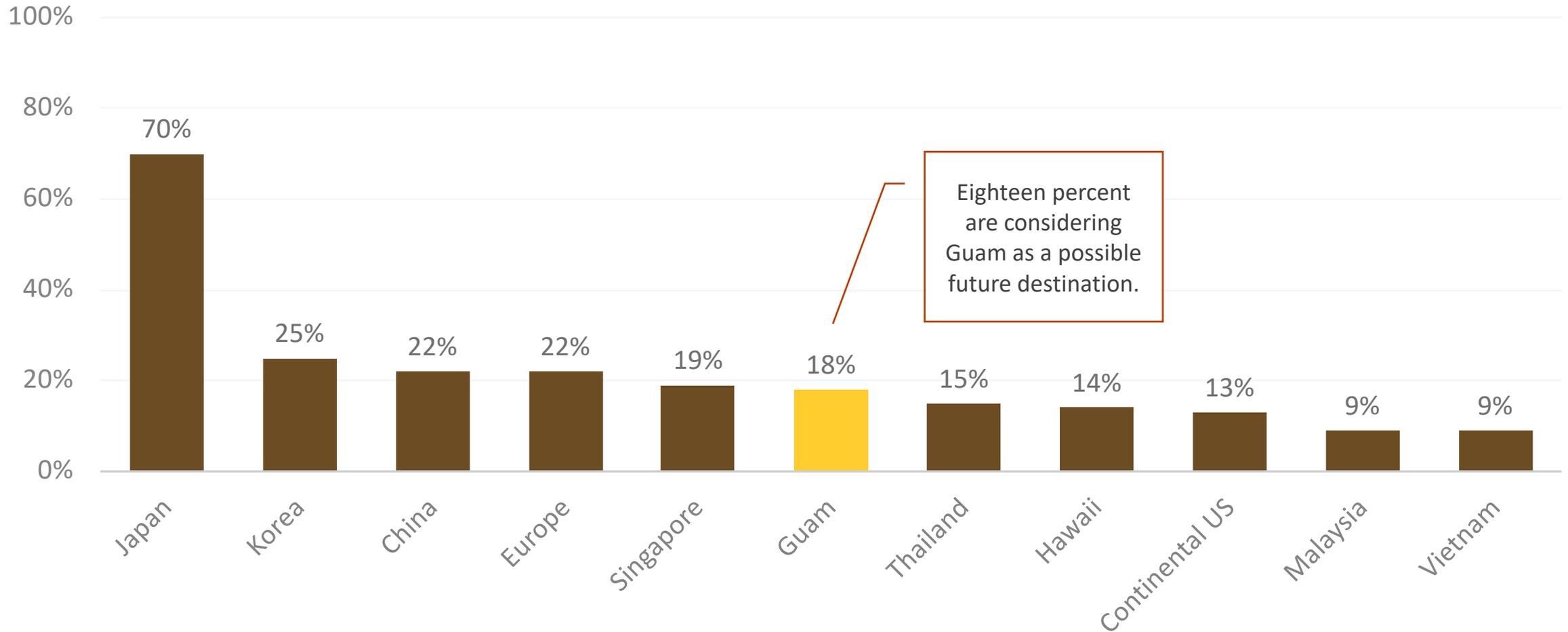


# FUTURE TRAVEL PLANS

At least half of those polled do not intend to travel internationally until the pandemic is over.



# POTENTIAL FUTURE TRAVEL DESTINATIONS

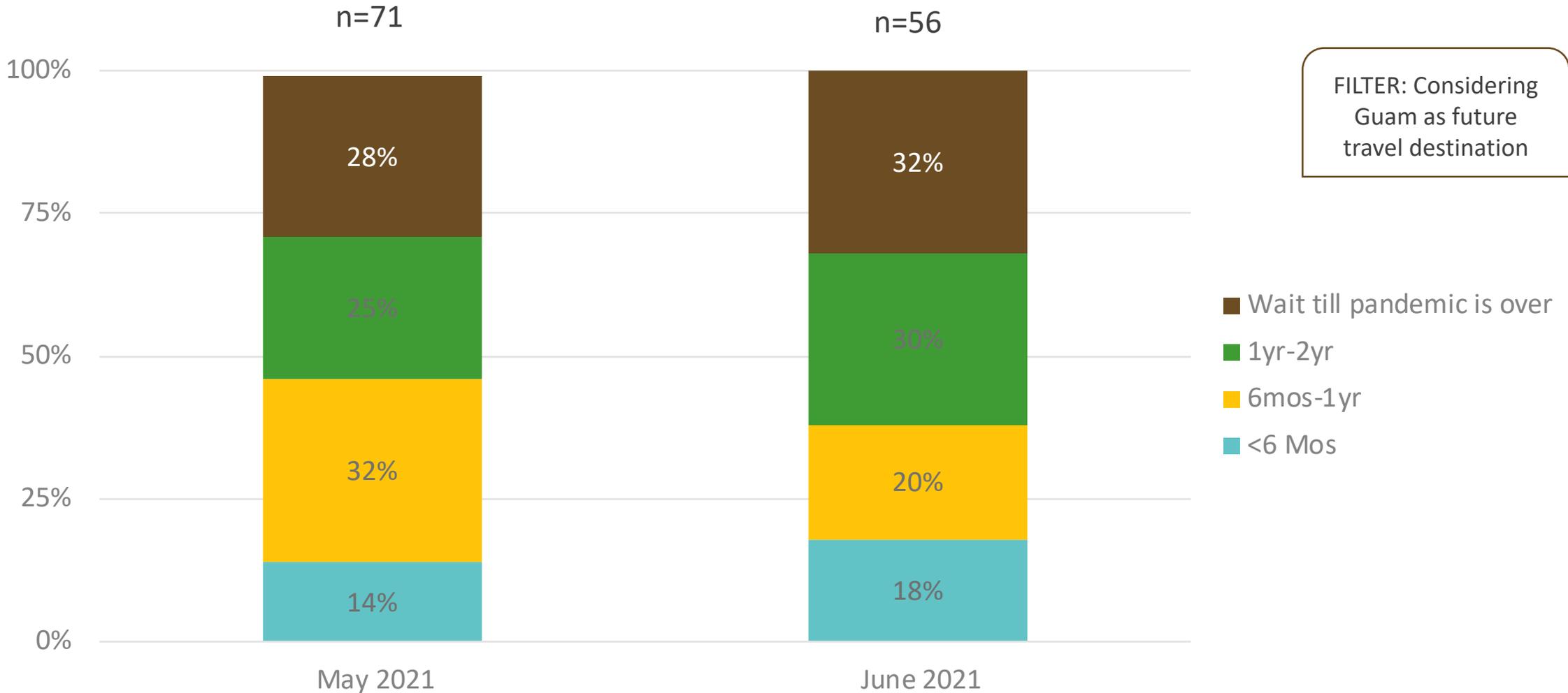


# POTENTIAL FUTURE TRAVEL DESTINATIONS

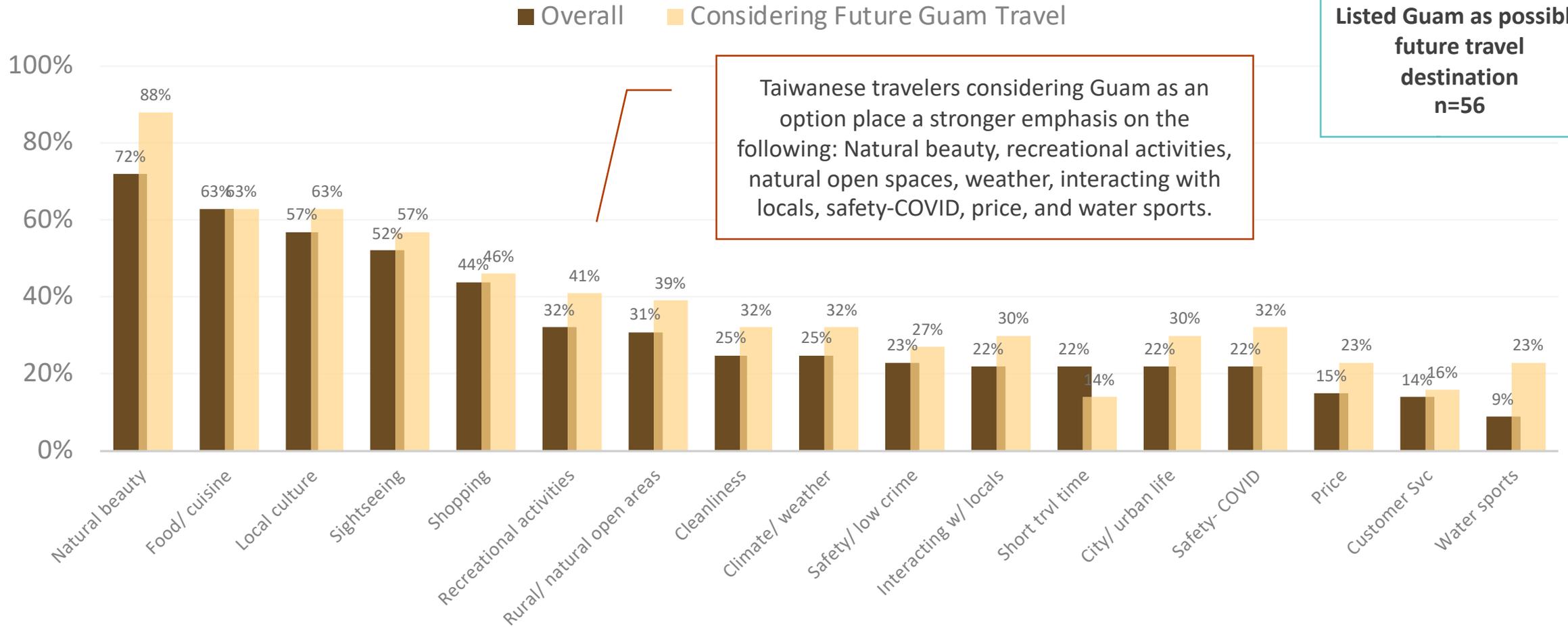
	May 2021	June 2021
Japan	71%	70%
Korea	23%	25%
China	21%	22%
Guam	23%	18%
Europe	17%	22%
Singapore	18%	19%
Thailand	17%	15%
Continental U.S.	14%	13%
Hawaii	12%	14%
Malaysia	11%	9%
Vietnam	8%	9%



# TIMING OF FUTURE TRAVEL TO GUAM



# APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



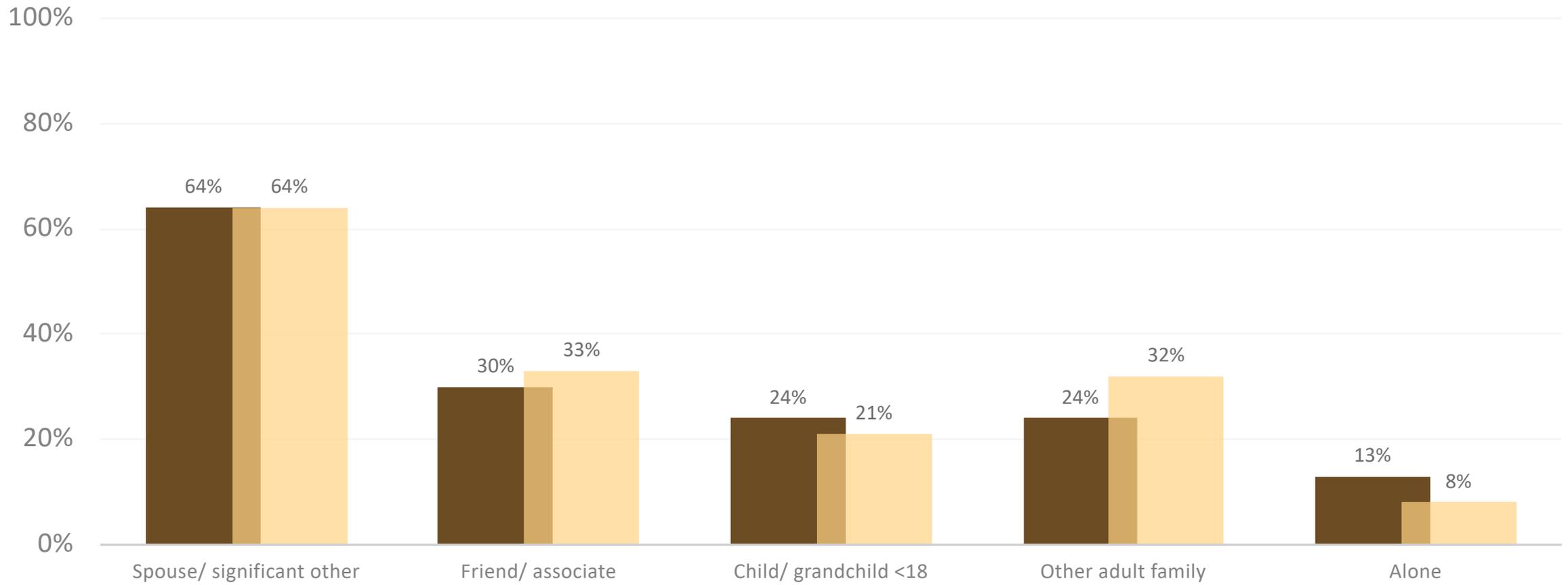
# APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

	May 2021	June 2021
Natural beauty	71%	72%
Food/ cuisine	61%	63%
Local culture	55%	57%
Sightseeing/ tourist spots	47%	52%
Shopping	44%	44%
Recreational activities	32%	32%
Rural/ open spaces	27%	31%
Cleanliness	28%	25%
Climate/ weather	26%	25%
Interacting w/ locals	25%	22%
Safety/ low crime	21%	23%
City/ urban life	20%	22%
Short travel distance	20%	22%
Safety- COVID	17%	22%
Customer service	18%	14%
Price	15%	15%
Water sports	12%	9%



# FUTURE INTERNATIONAL TRAVEL PARTY

■ May-21 ■ Jun-21



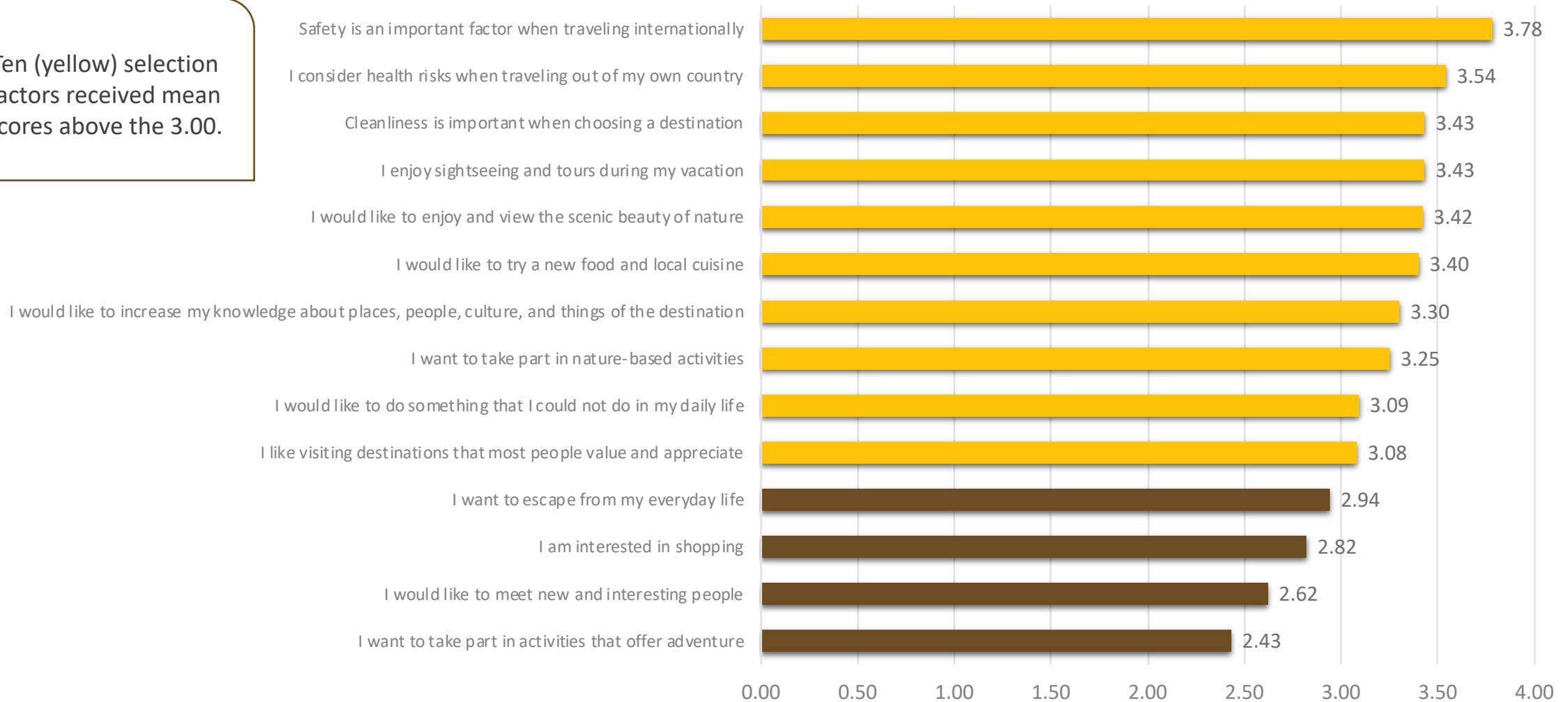
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



# DESTINATION SELECTION FACTORS – IMPORTANCE

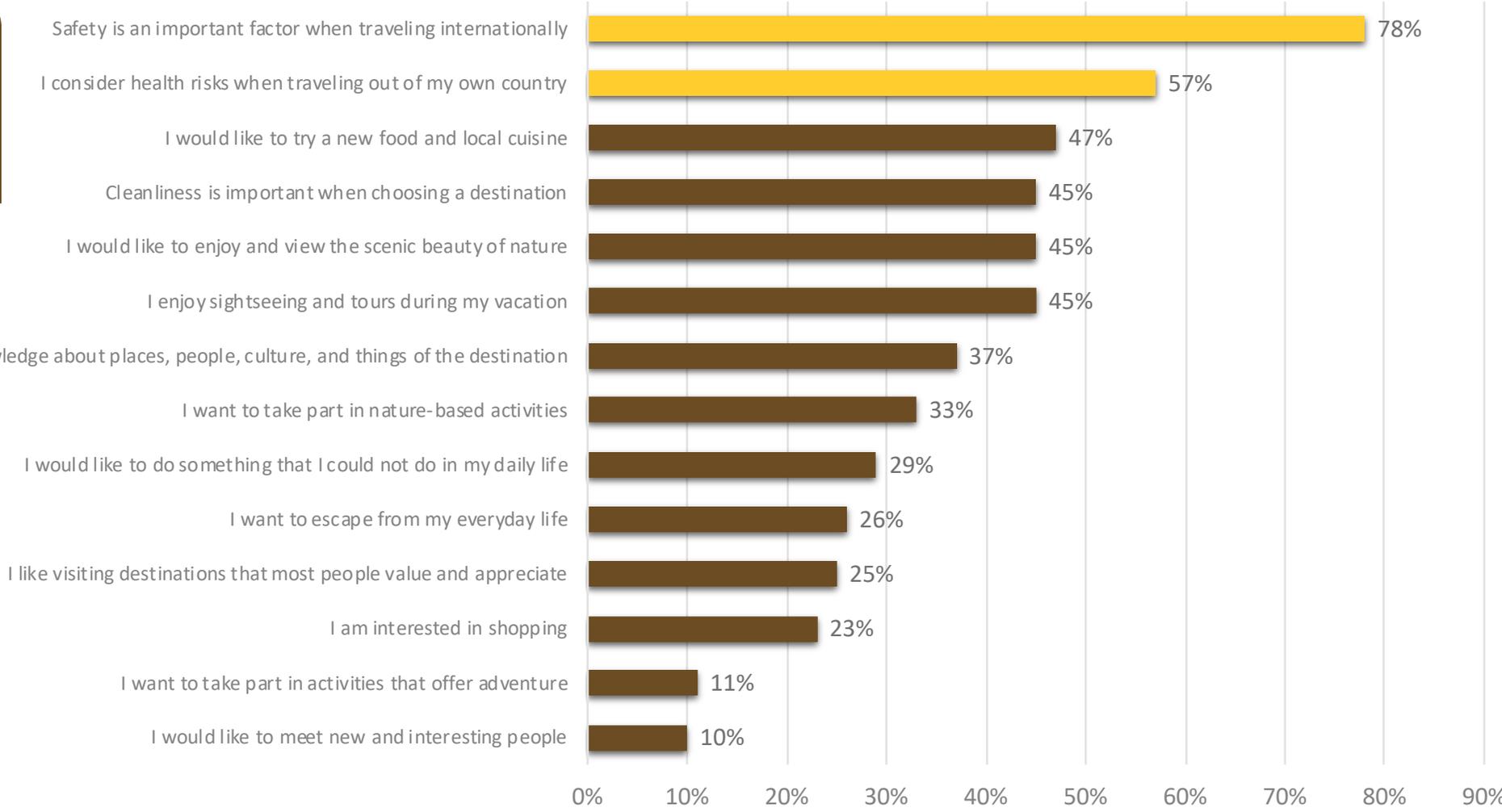
## MEAN SCORE 4PT SCALE

Ten (yellow) selection factors received mean scores above the 3.00.

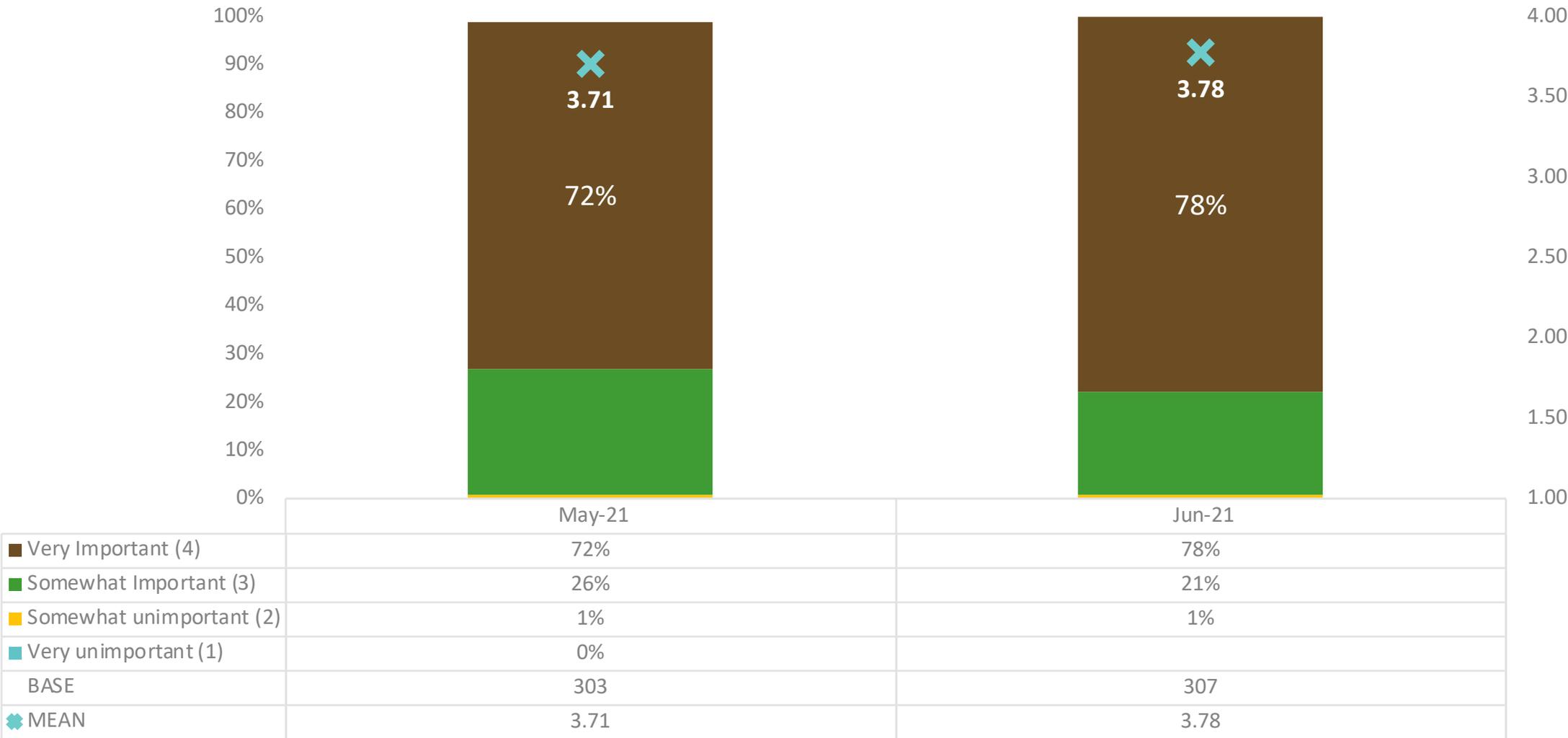


# DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

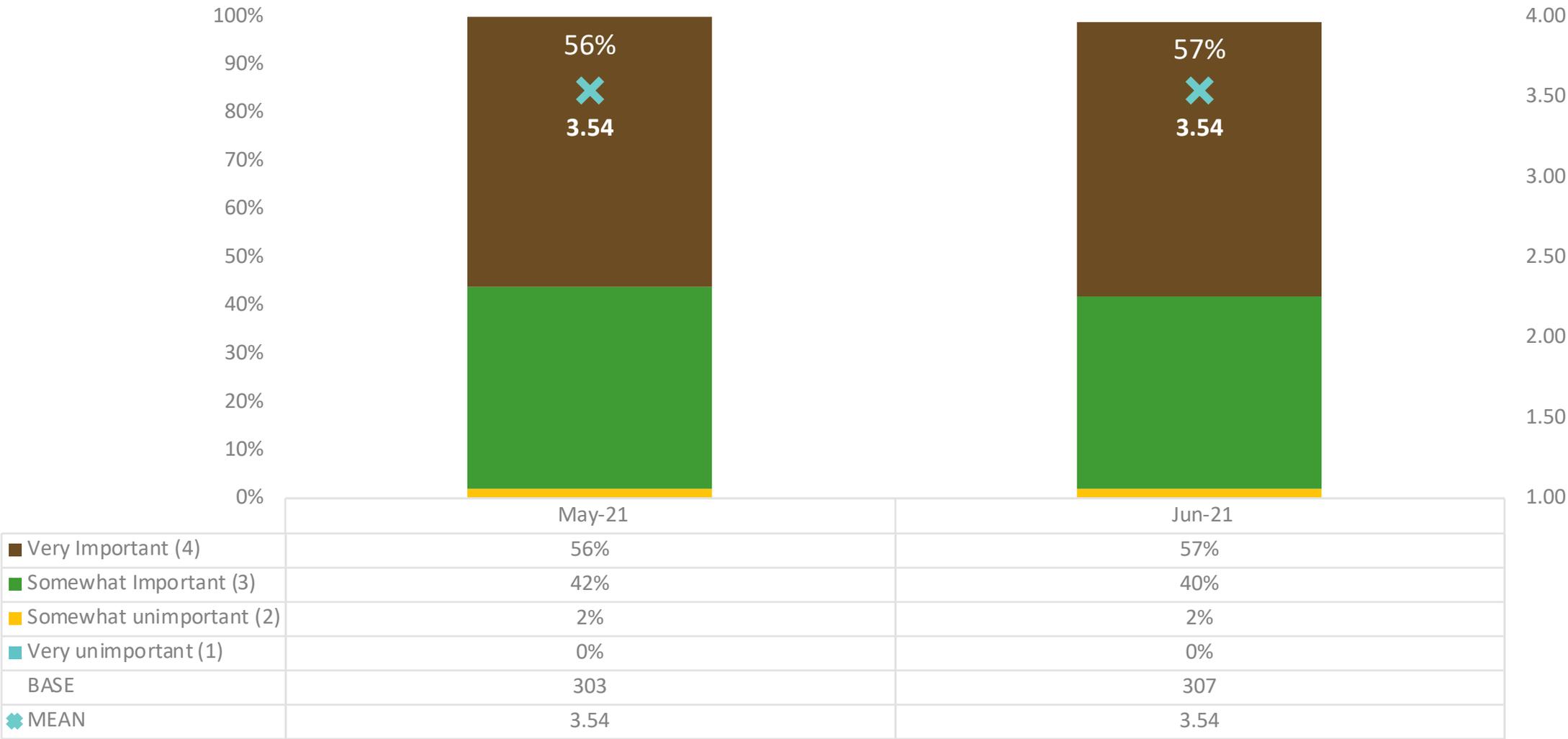
Two (yellow) selection factors received top box (very important) scores above 50%



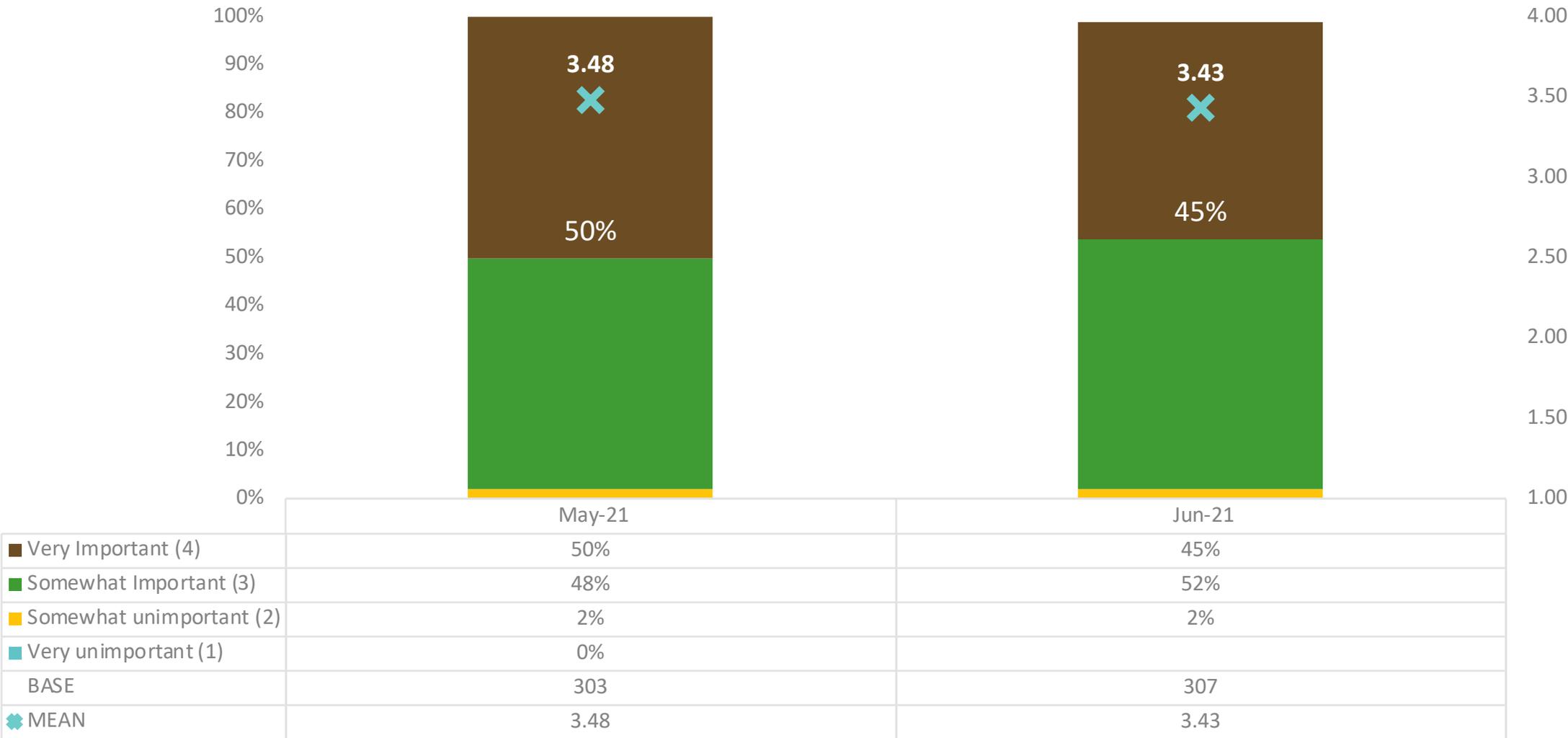
# Safety is an important factor when traveling internationally



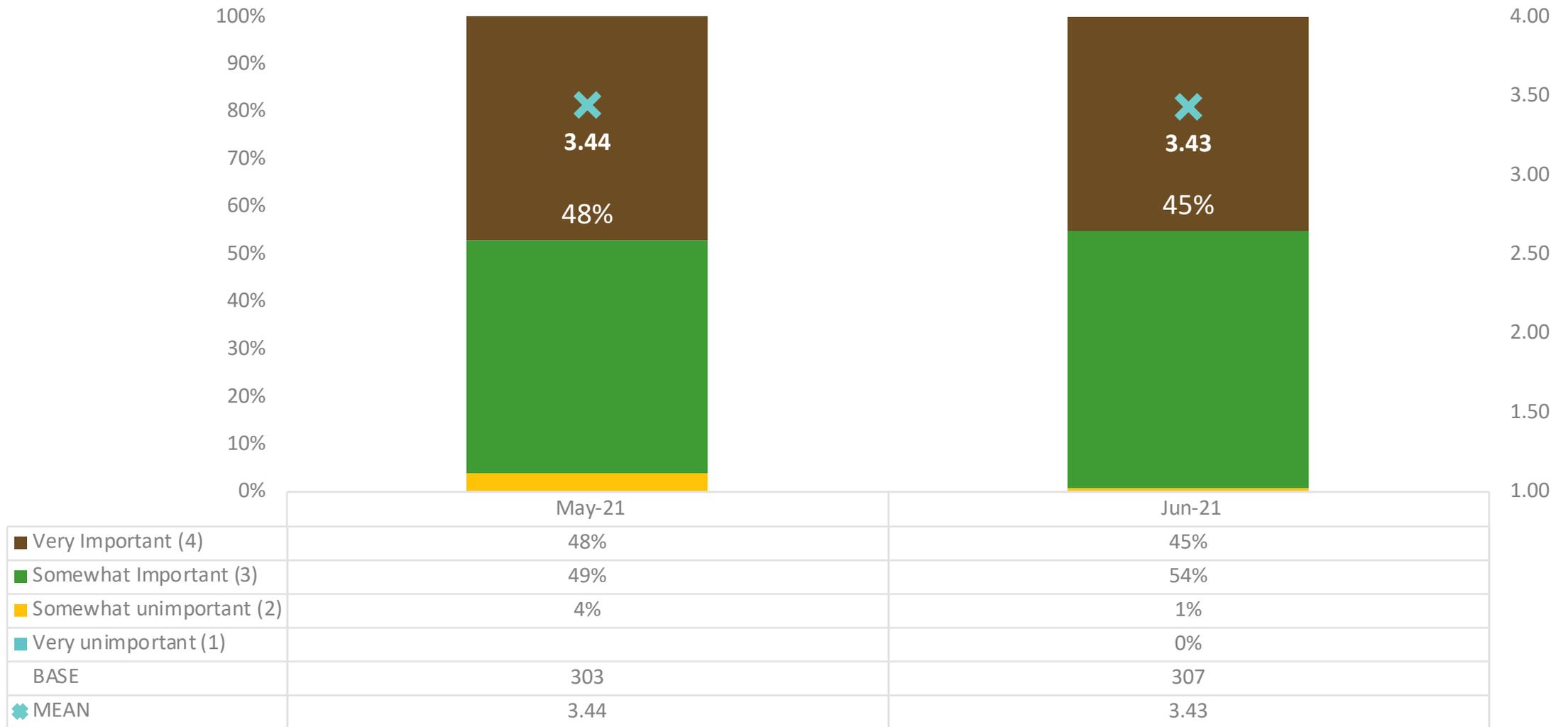
# I consider health risks when traveling out of my own country



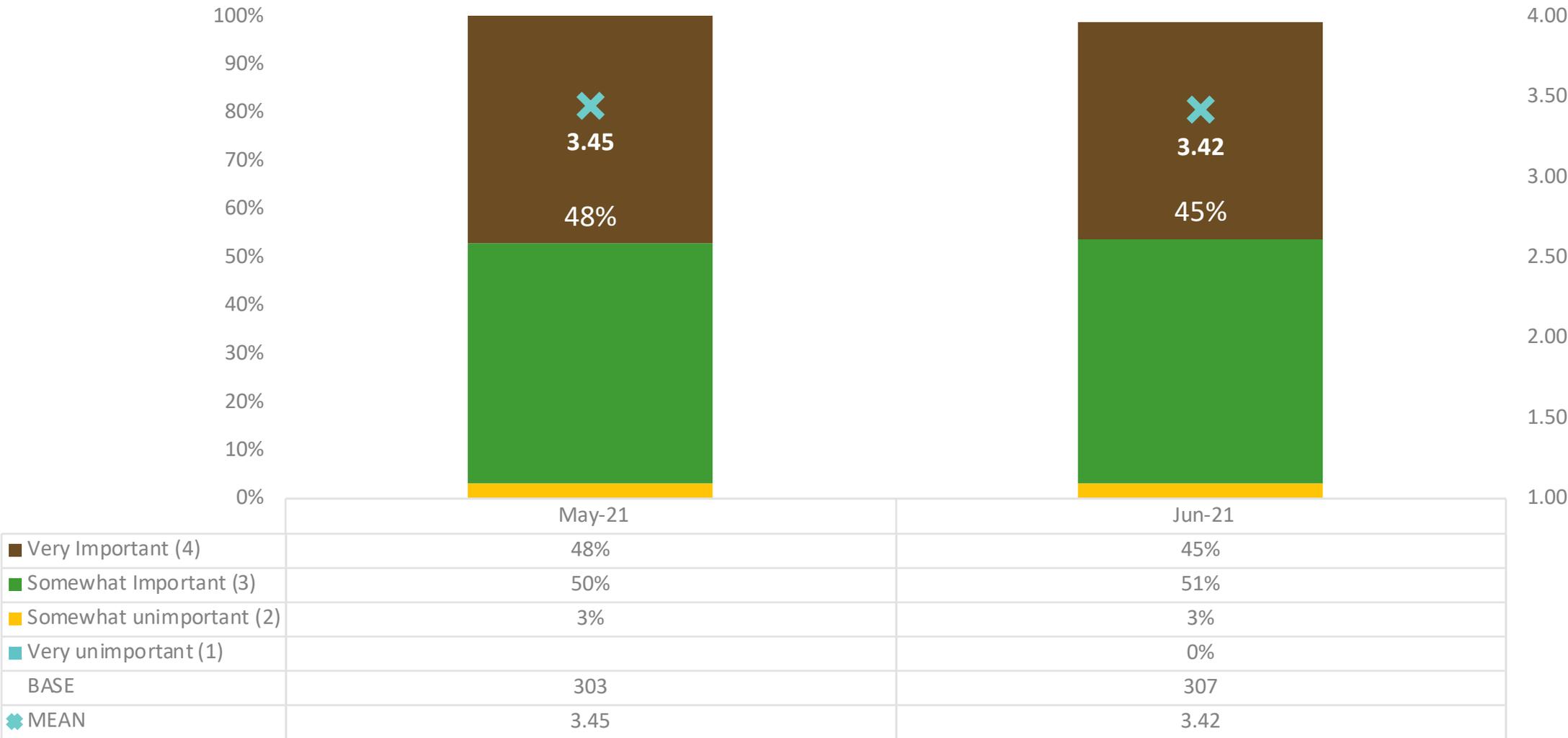
# Cleanliness is important when choosing a destination



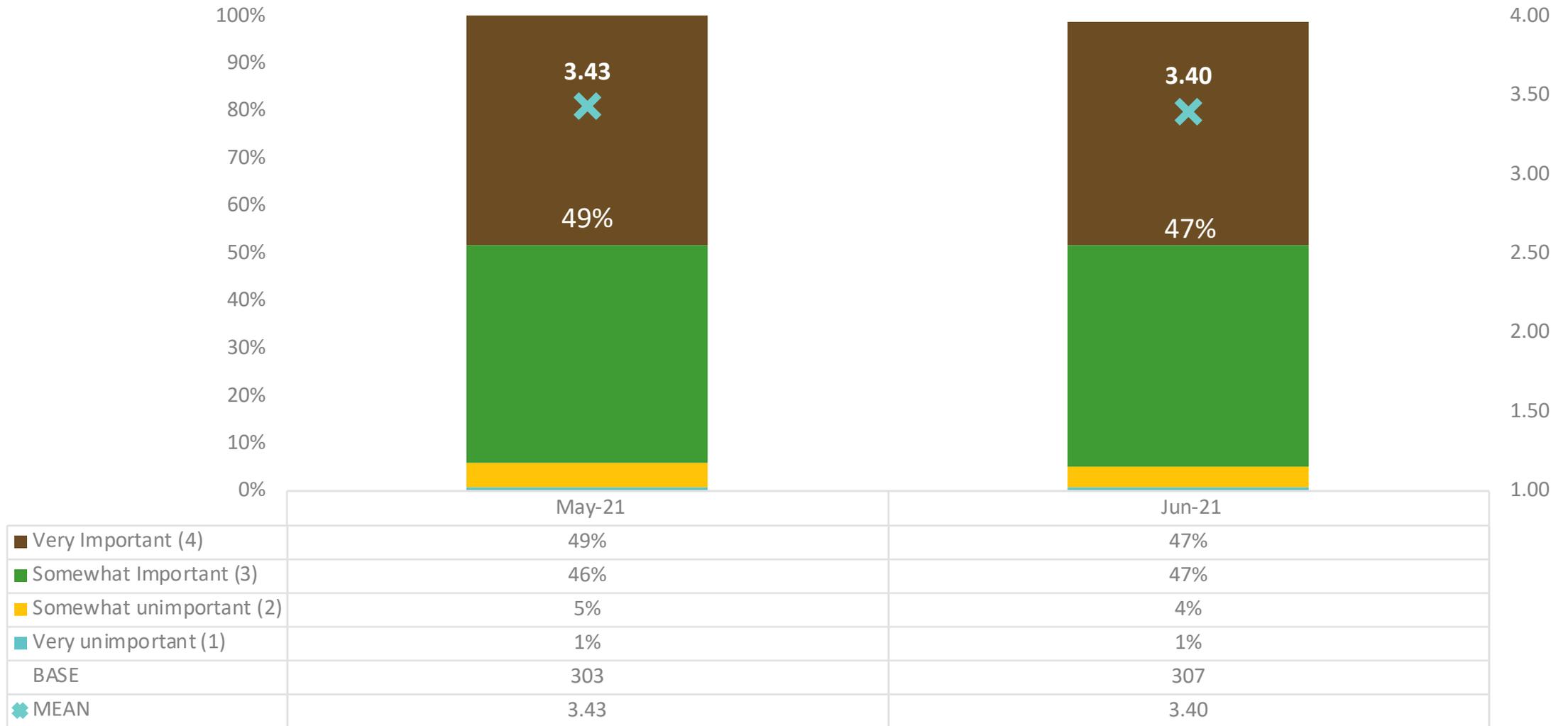
# I enjoy sightseeing and tours during my vacation



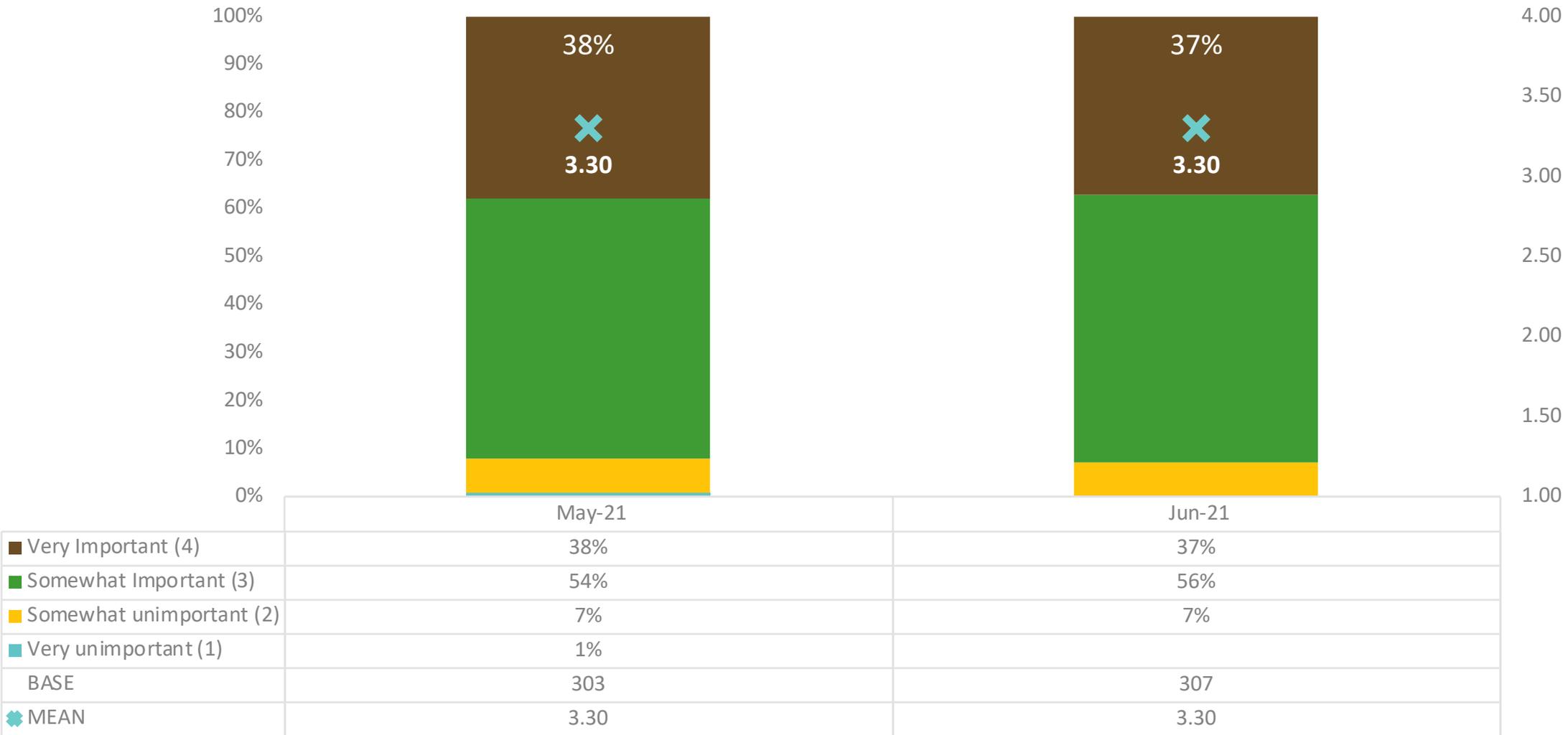
# I would like to enjoy and view the scenic beauty of nature



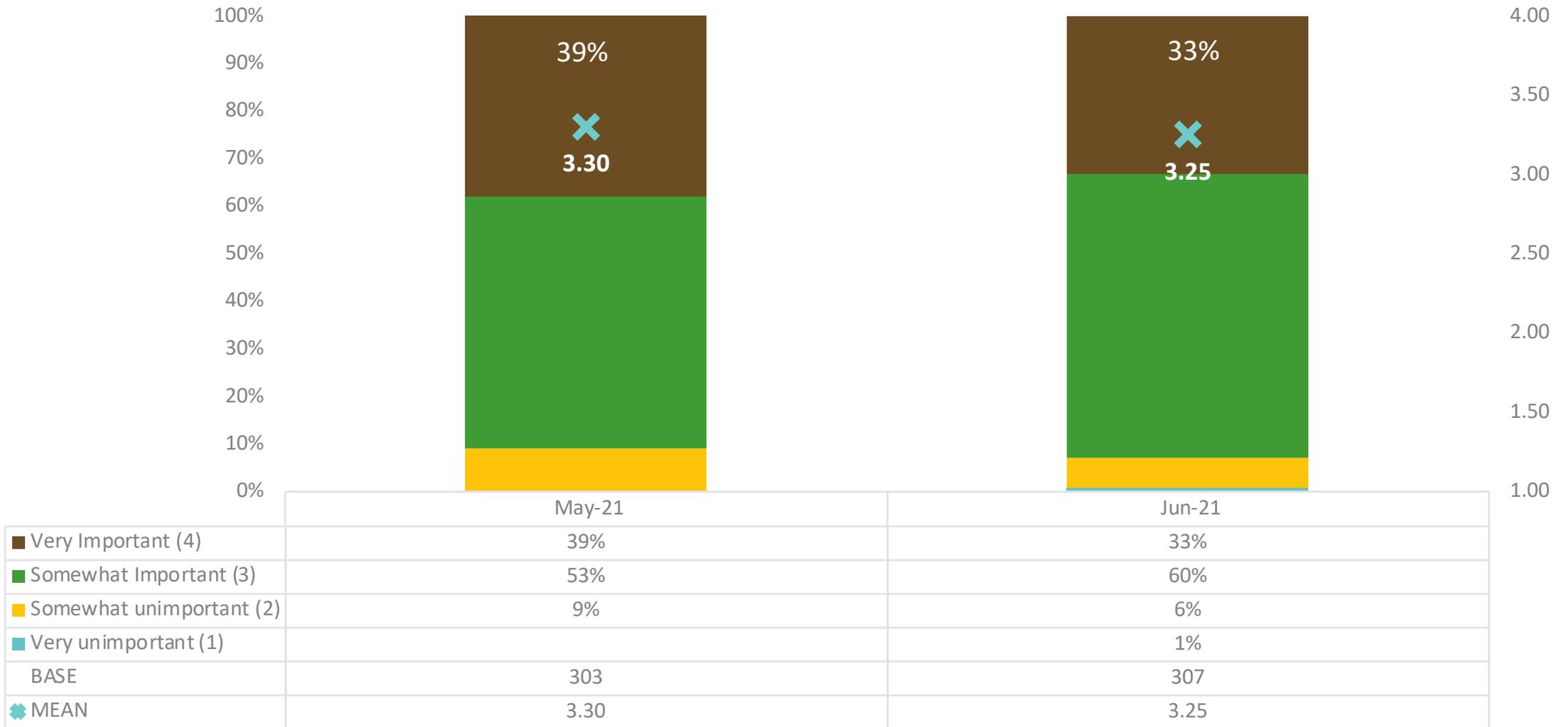
# I would like to try a new food and local cuisine



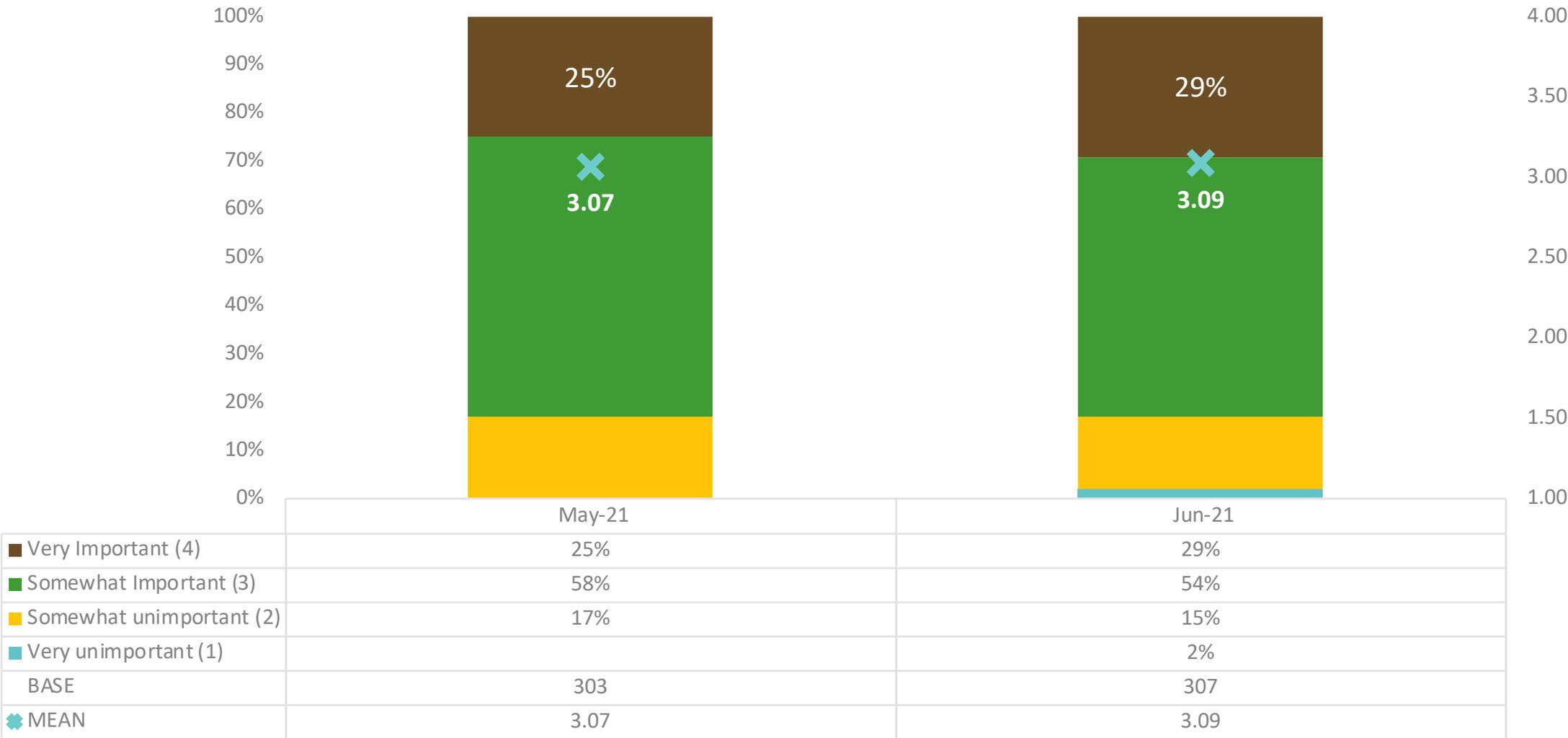
# I would like to increase my knowledge about places, people, culture, and things of the destination



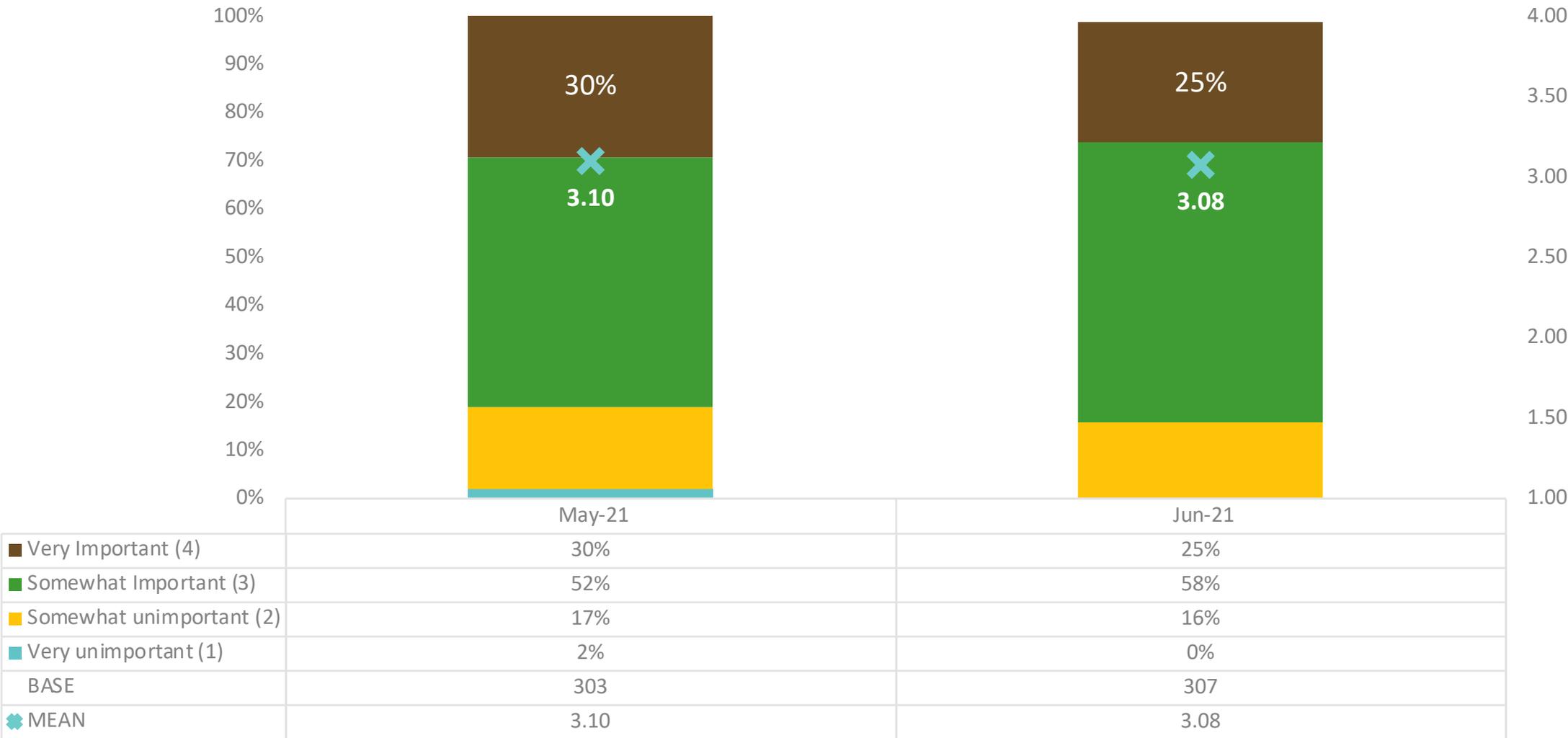
# I want to take part in nature-based activities



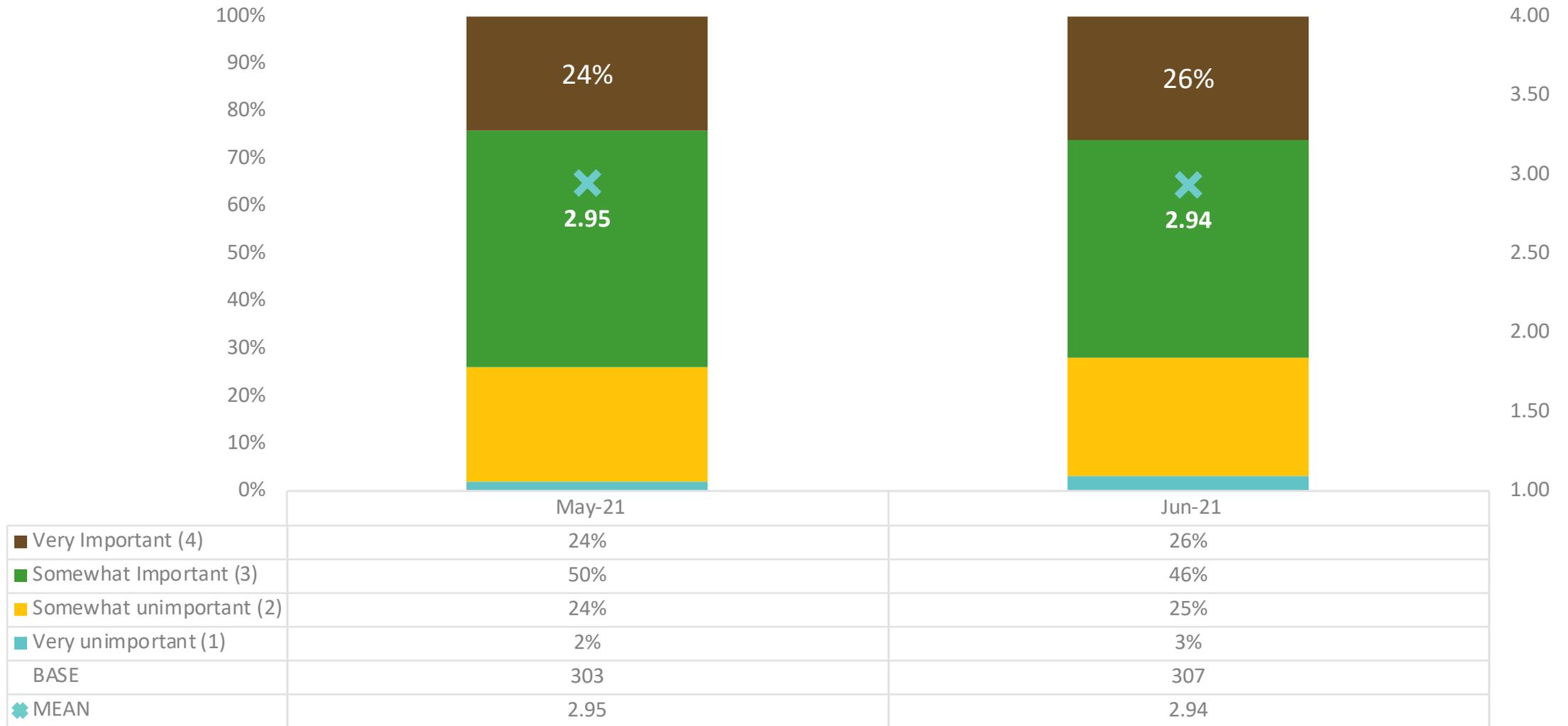
# I would like to do something that I could not do in my daily life



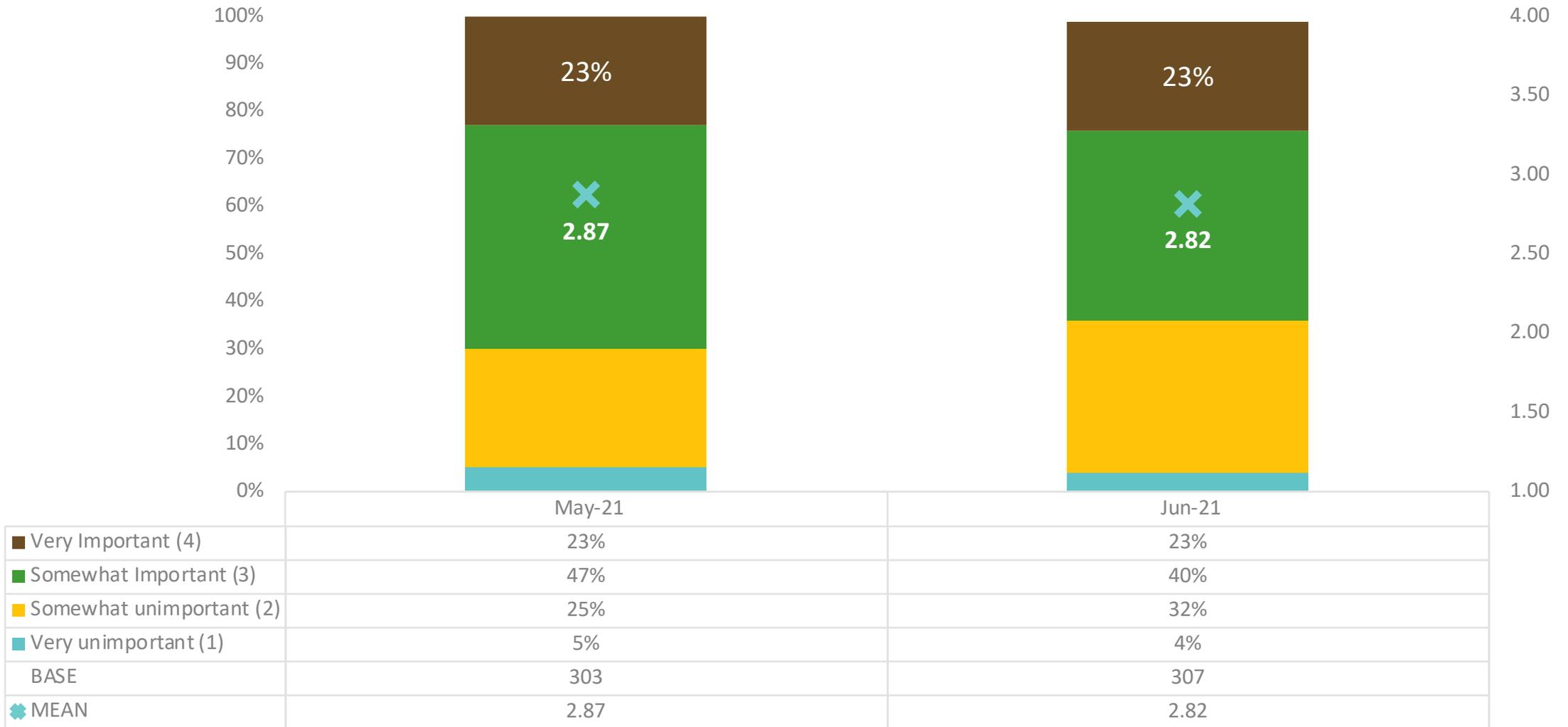
# I like visiting destinations that most people value and appreciate



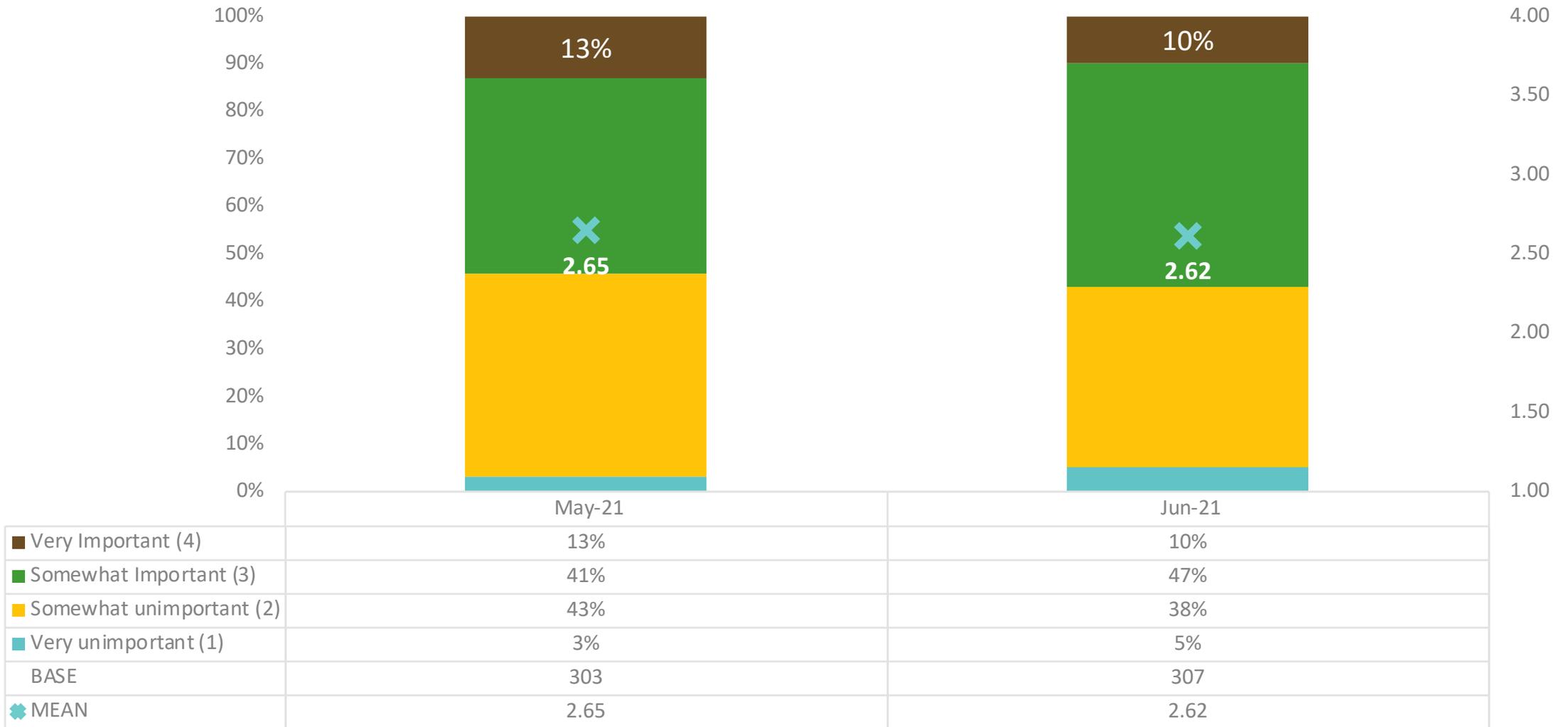
# I want to escape my everyday life



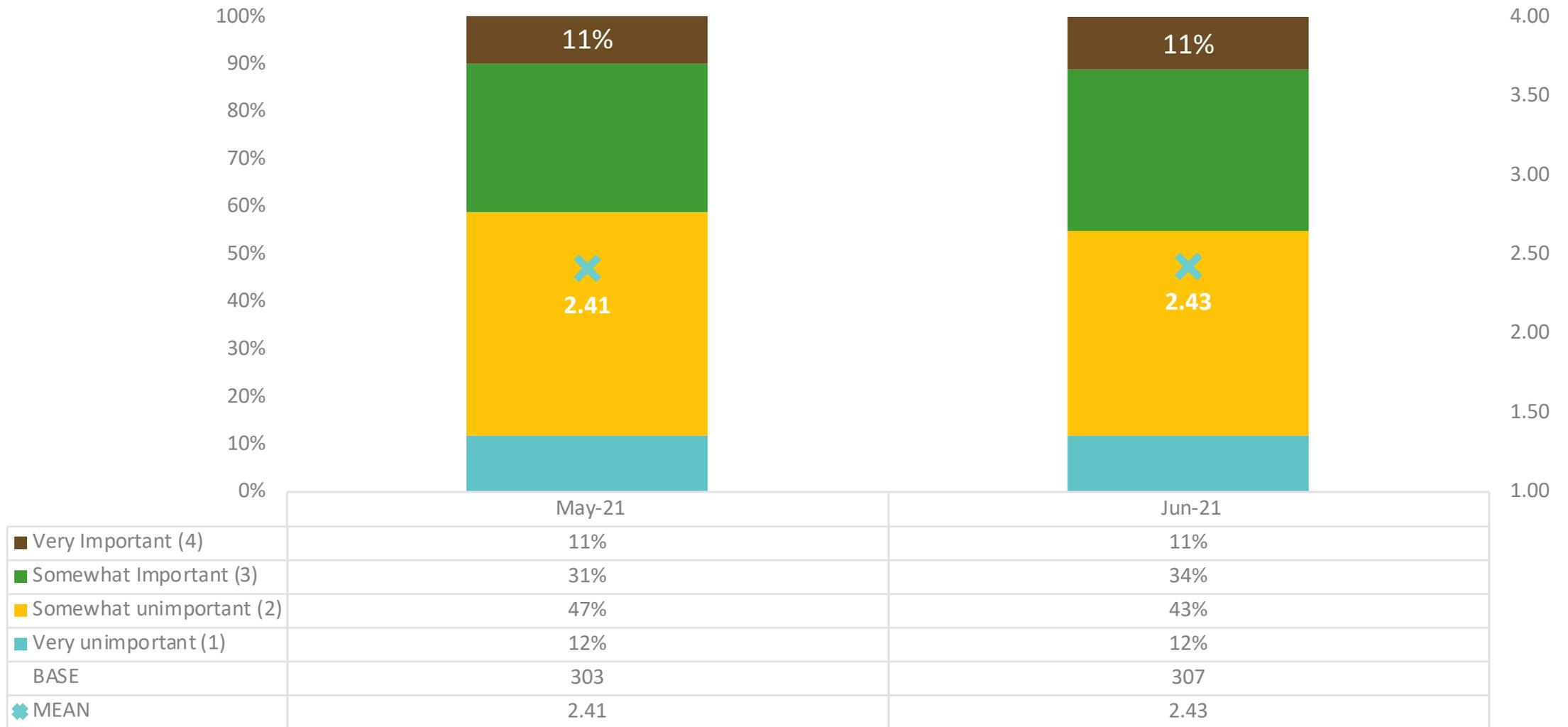
# I am interested in shopping



# I would like to meet new and interesting people

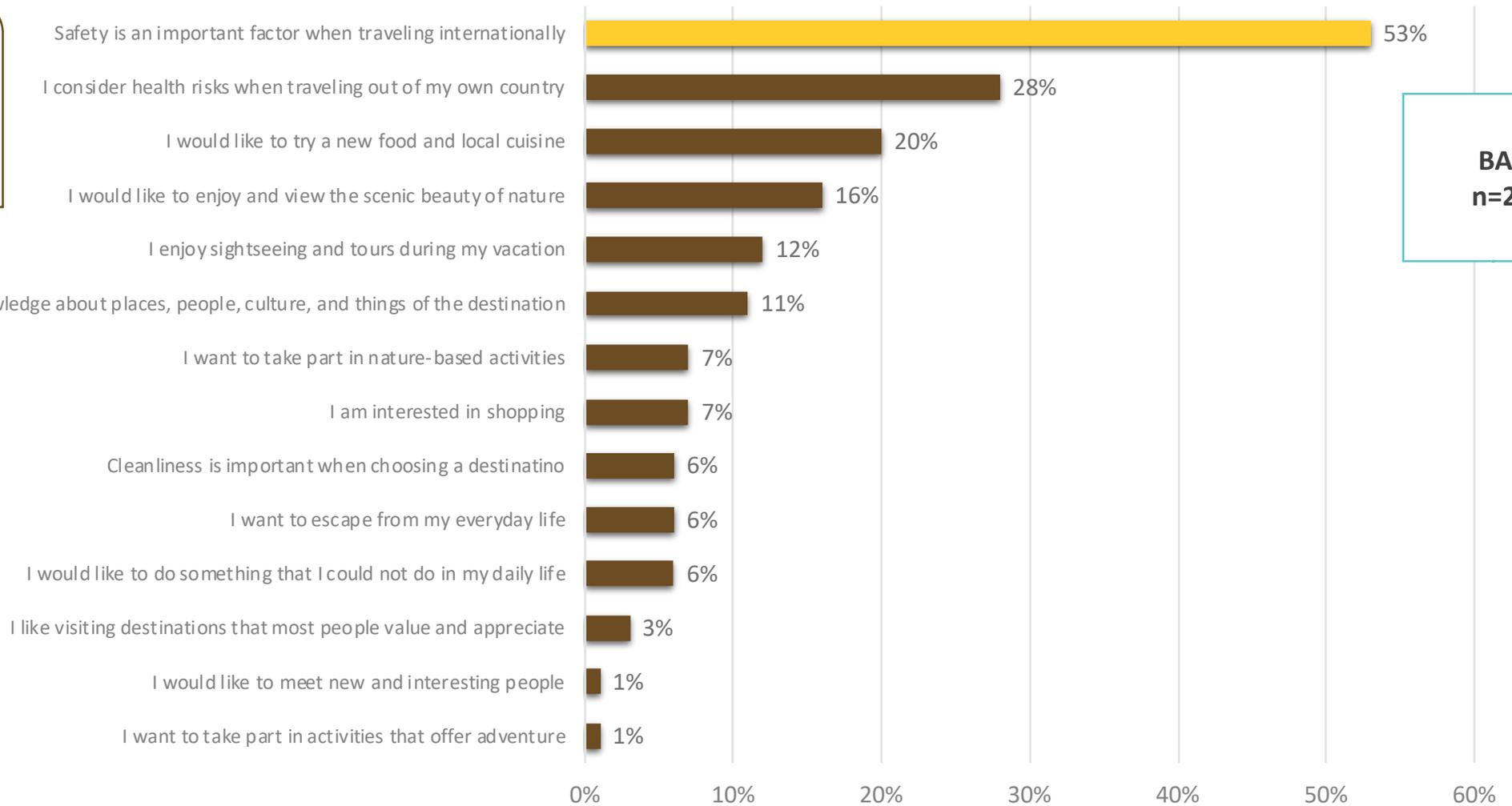


# I want to take part in activities that offer adventure



# DESTINATION SELECTION FACTORS – TOP TWO

Safety was the top selection factor chosen.



BASE  
n=282

# DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021
BASE	264	282
<i>Safety is an important factor when traveling internationally</i>	52%	53%
<i>I consider health risks when traveling out of my own country</i>	27%	28%
<i>I would like to try a new food and local cuisine</i>	23%	20%
<i>I would like to enjoy and view the scenic beauty of nature</i>	18%	16%
<i>I enjoy sightseeing and tours during my vacation</i>	16%	12%
<i>I would like to increase my knowledge about places, people, culture, and things of the destination</i>	11%	11%
<i>Cleanliness is important when choosing a destination</i>	14%	6%
<i>I want to take part in nature-based activities</i>	6%	7%
<i>I am interested in shopping</i>	4%	7%
<i>I want to escape from my everyday life</i>	4%	6%
<i>I would like to do something that I could not do in my daily life</i>	2%	6%
<i>I like visiting destinations that most people value and appreciate</i>	3%	3%
<i>I would like to meet new and interesting people</i>	2%	1%
<i>I want to take part in activities that offer adventure</i>	1%	1%





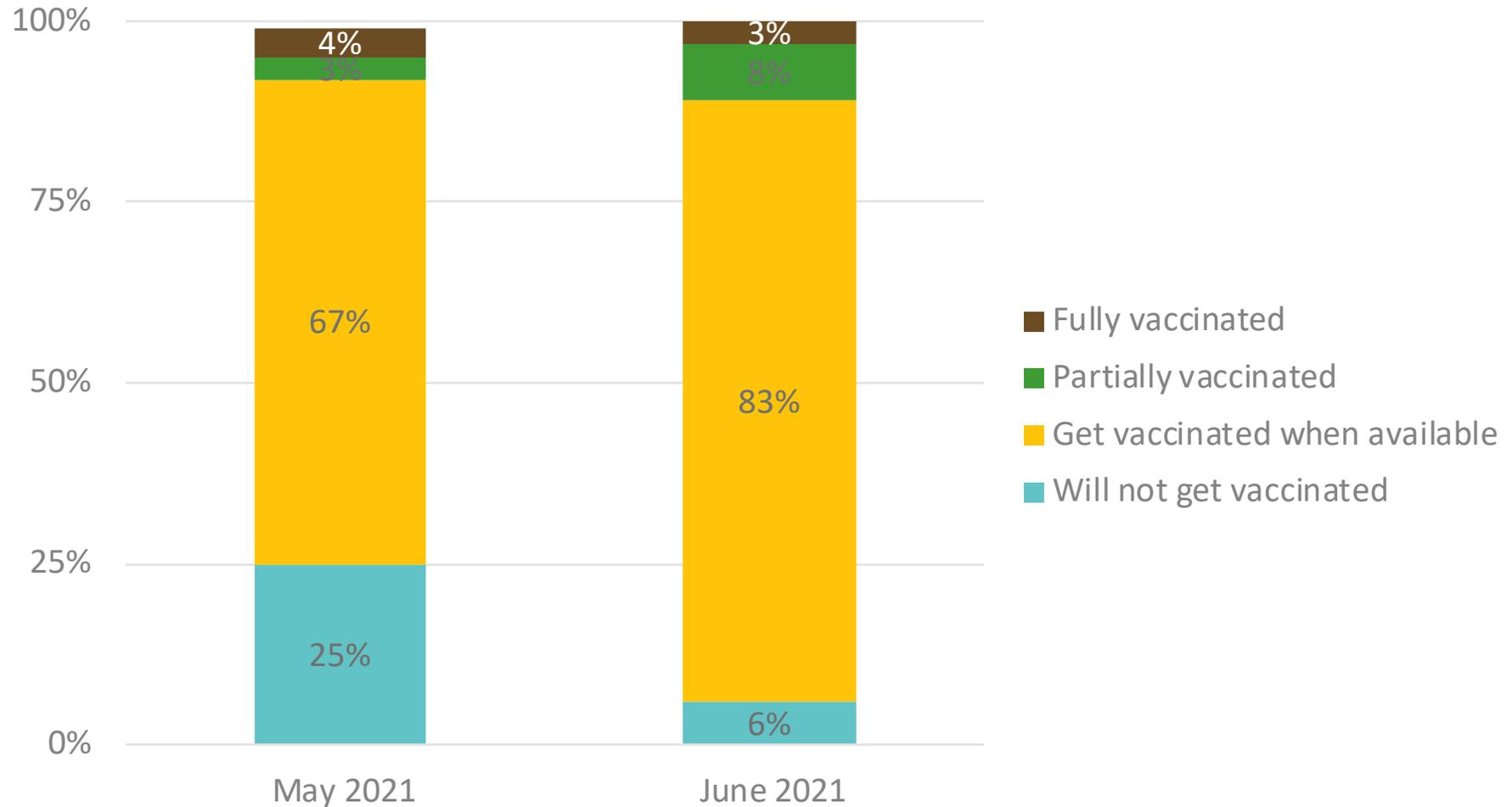
SECTION 2

# COVID-19



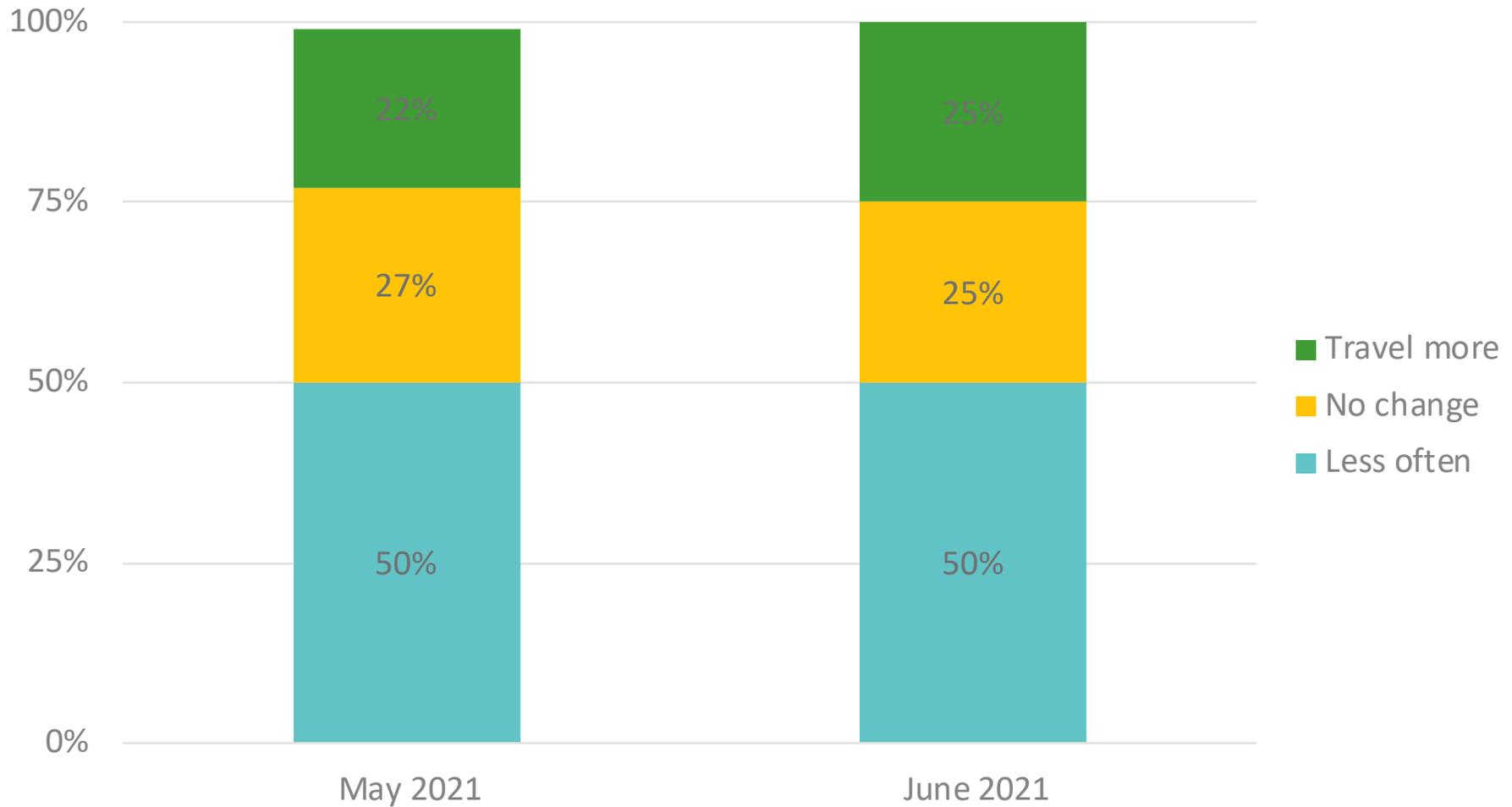
# COVID-19 VACCINE STATUS

The proportion of respondents who are vaccinated is very small.



# POST-COVID TRAVEL

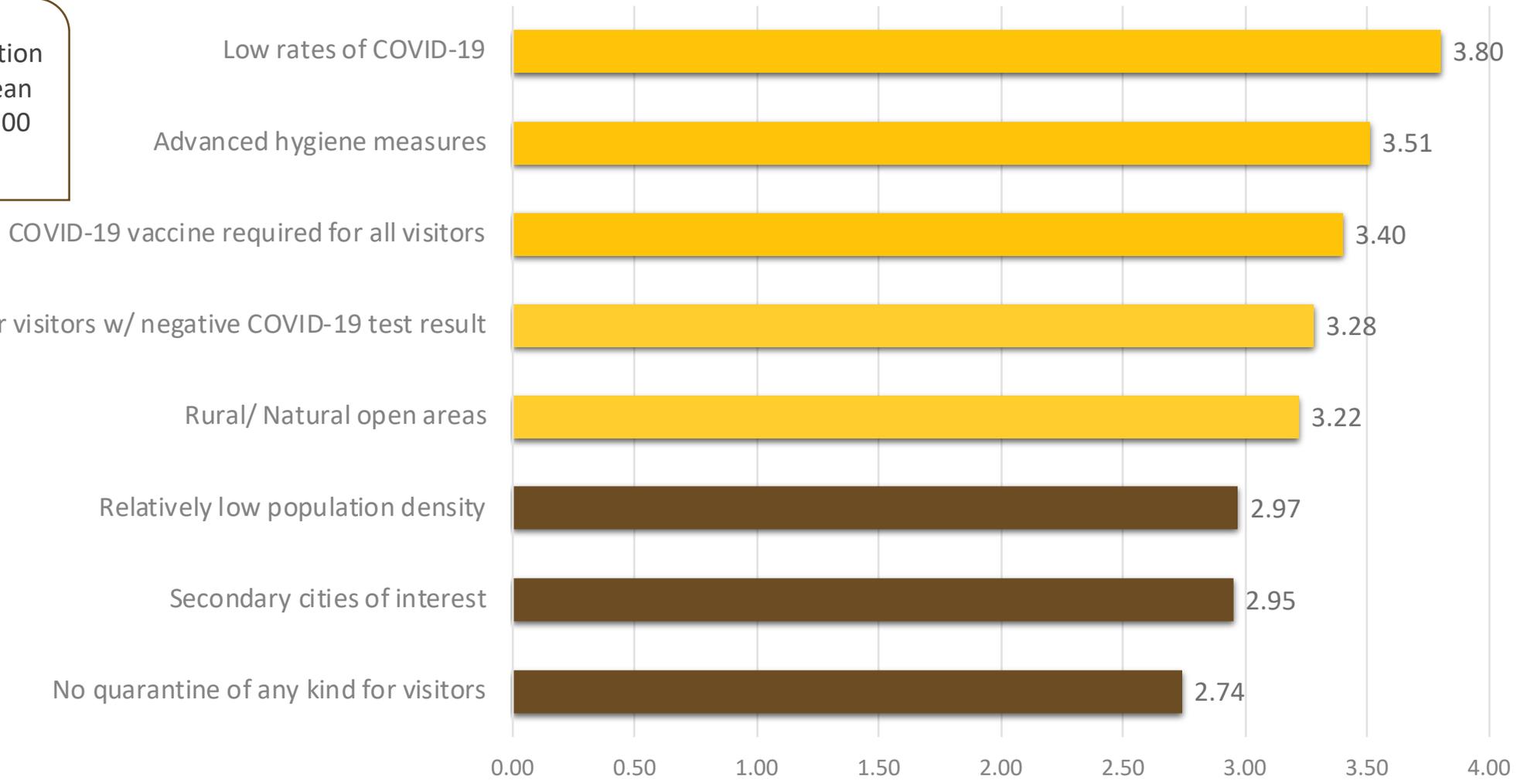
Recovery of the Taiwanese market will take time.



# POST-COVID TRAVEL – IMPORTANCE

## 4PT RATING SCALE – MEAN SCORE

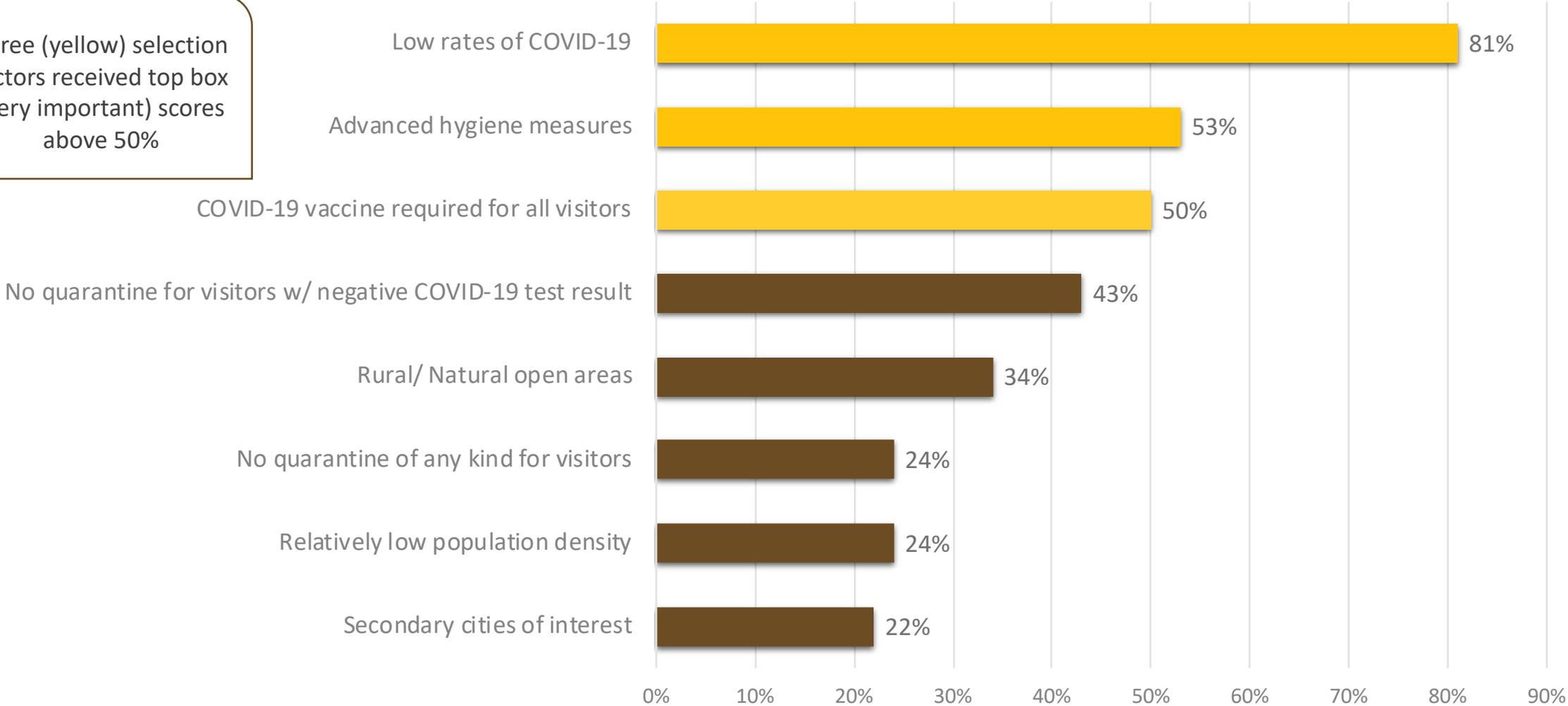
Three (yellow) selection factors received mean scores above the 3.00 threshold.



# POST-COVID TRAVEL – IMPORTANCE

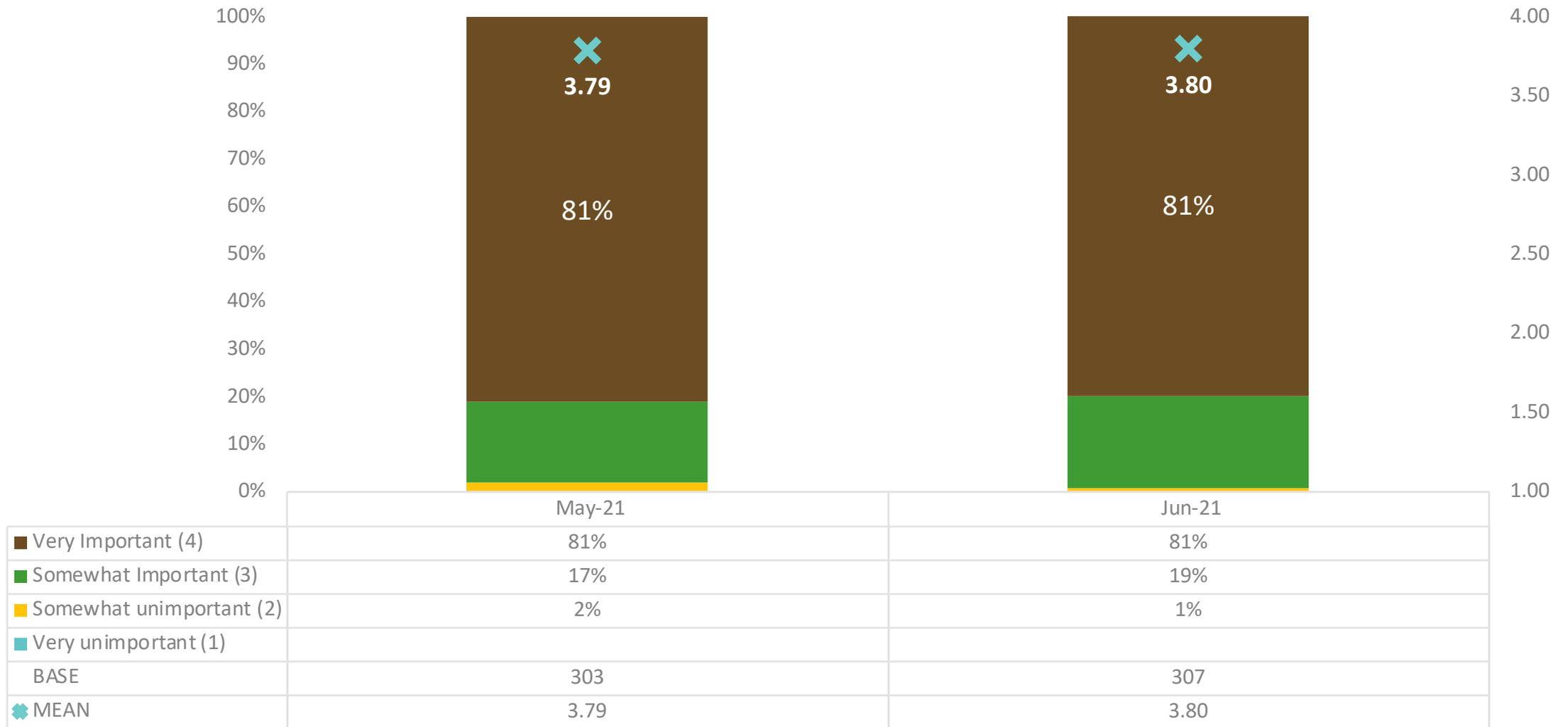
## 4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

Three (yellow) selection factors received top box (very important) scores above 50%



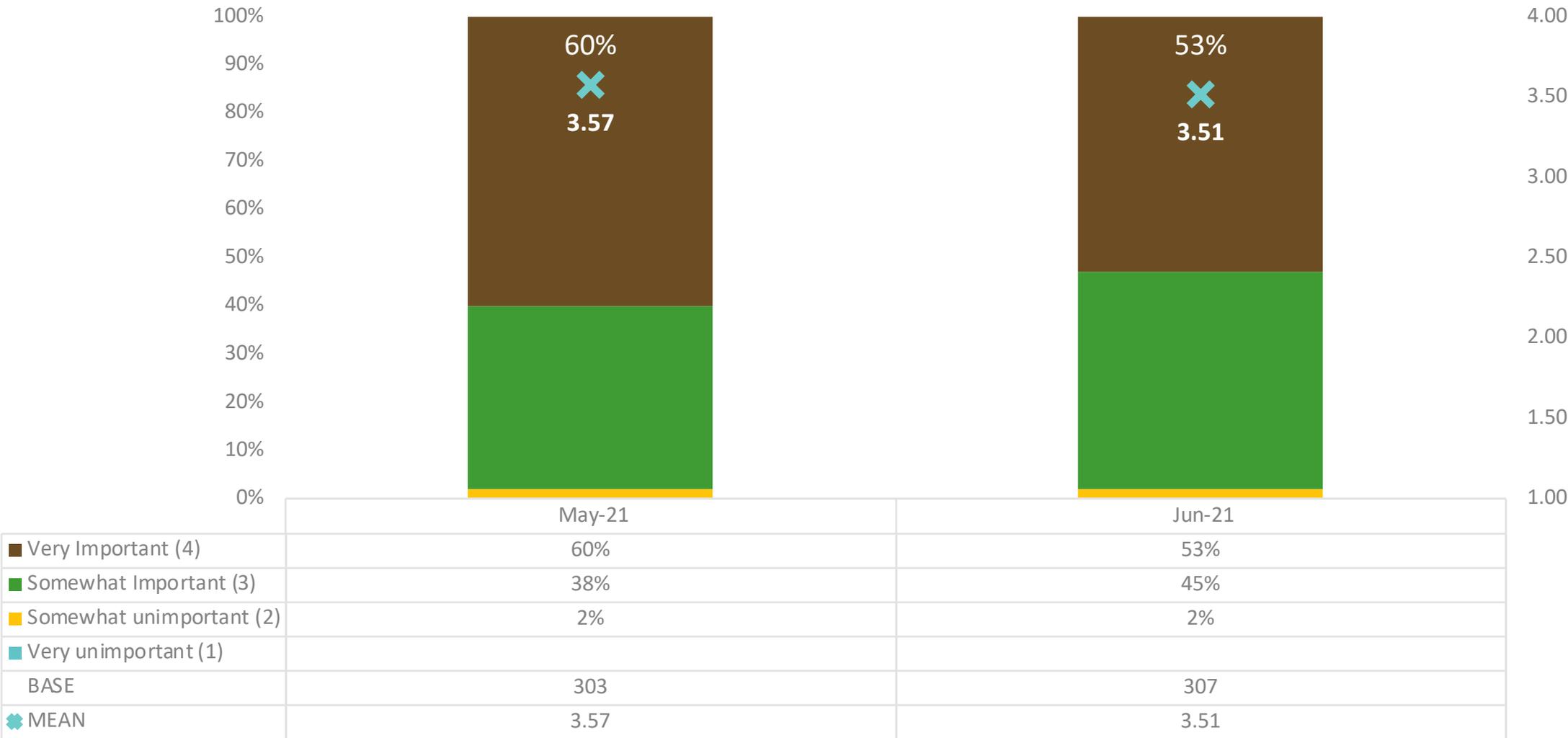
# POST-COVID SELECTION FACTOR

## Low rates of COVID-19



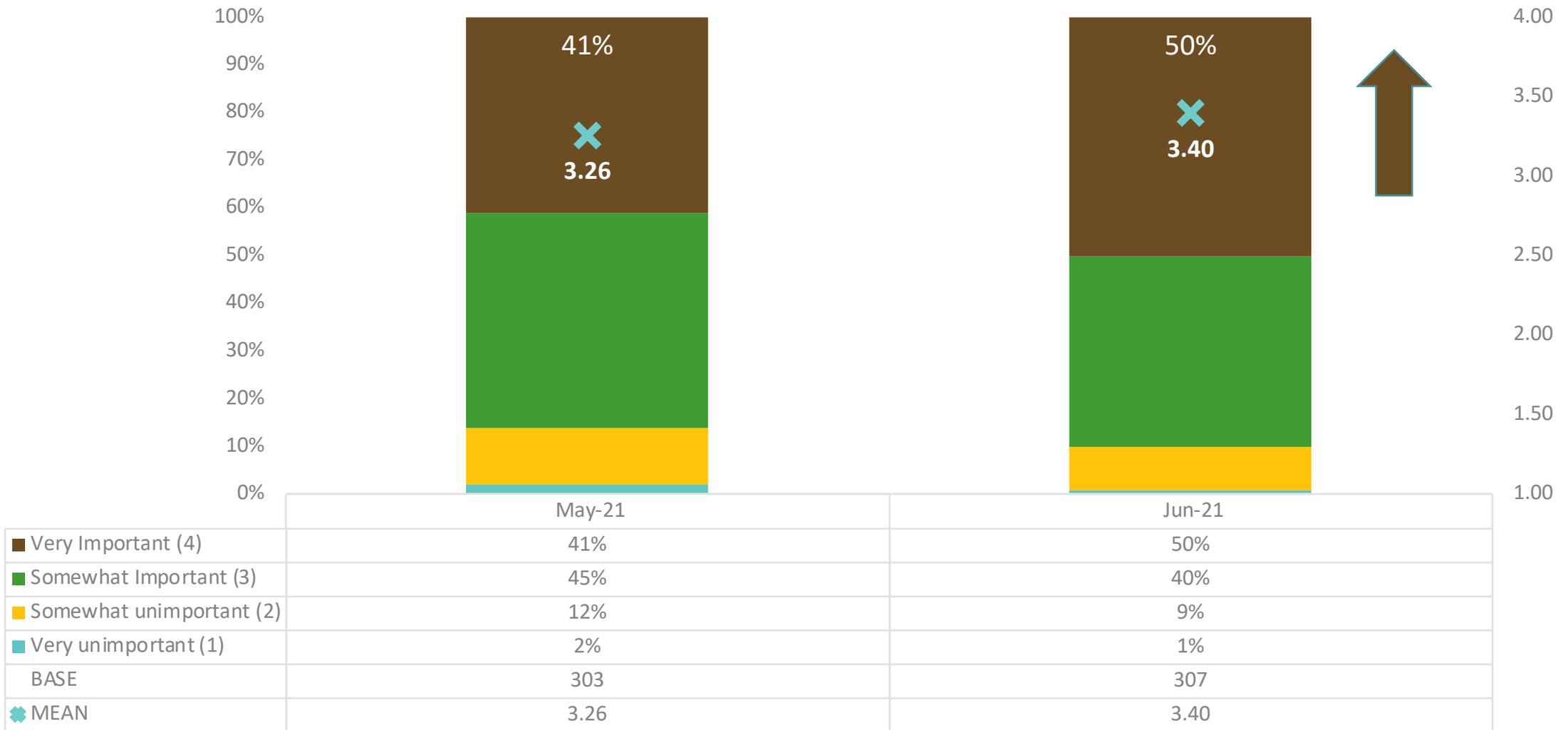
# POST-COVID SELECTION FACTOR

## Advanced hygiene measures



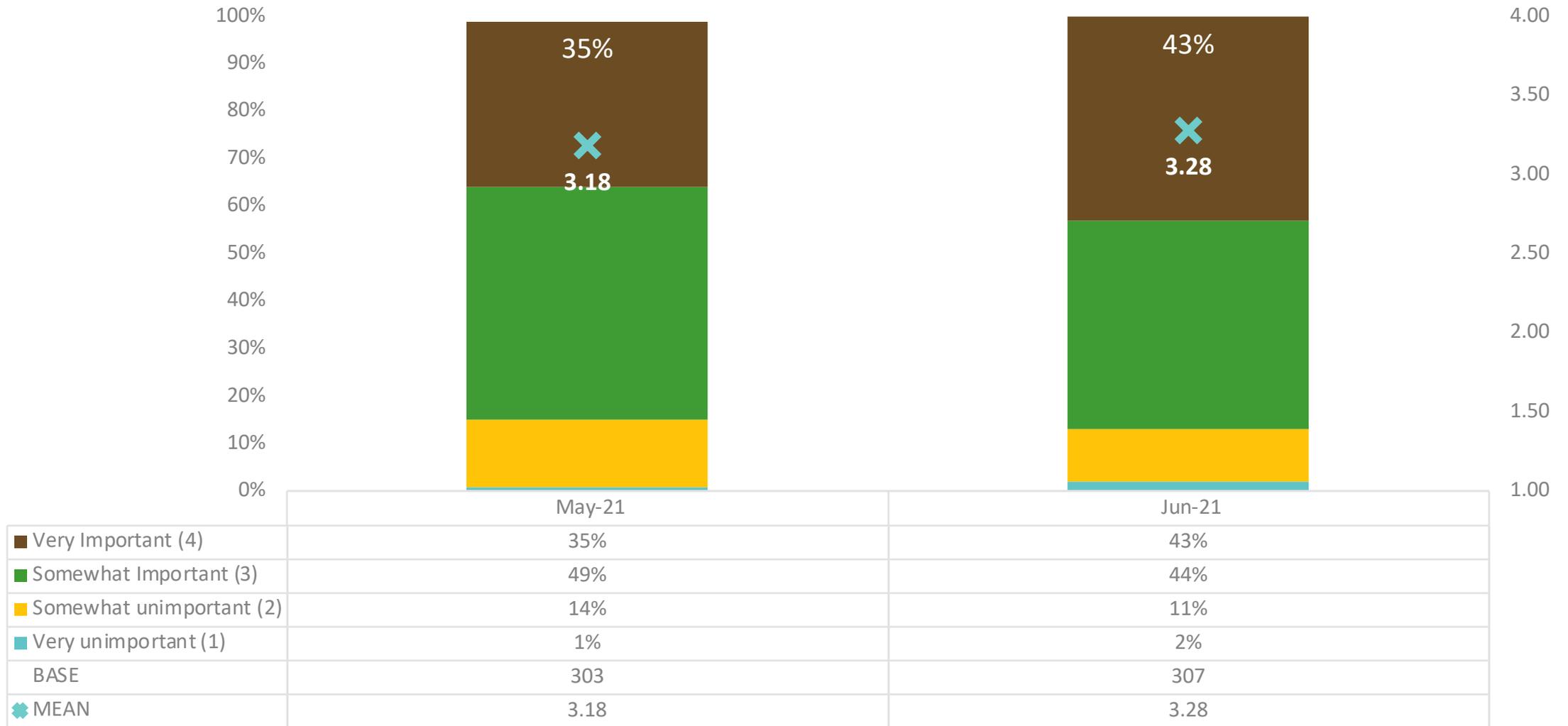
# POST-COVID SELECTION FACTOR

## COVID-19 vaccine required for all visitors



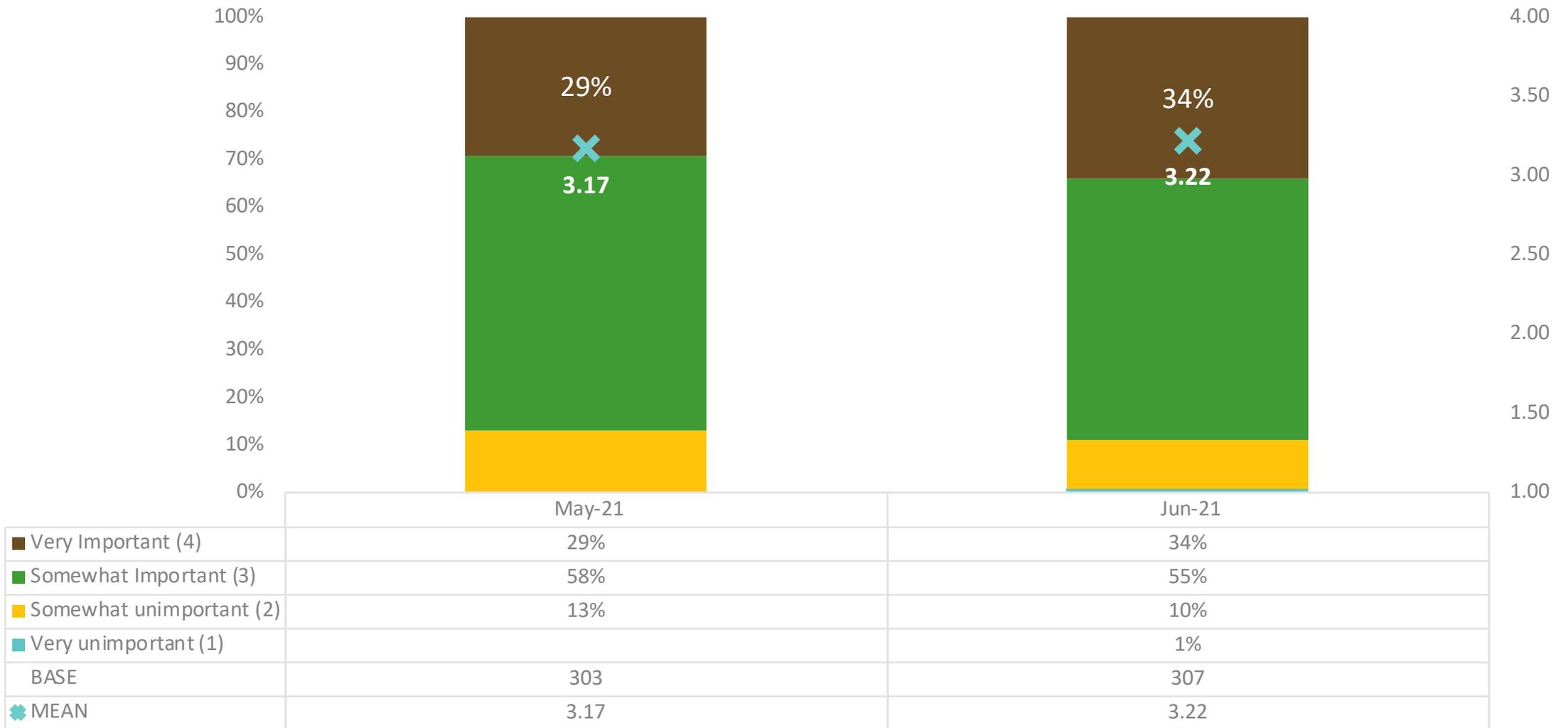
# POST-COVID SELECTION FACTOR

## No quarantine for visitors w/ negative COVID-19 test results



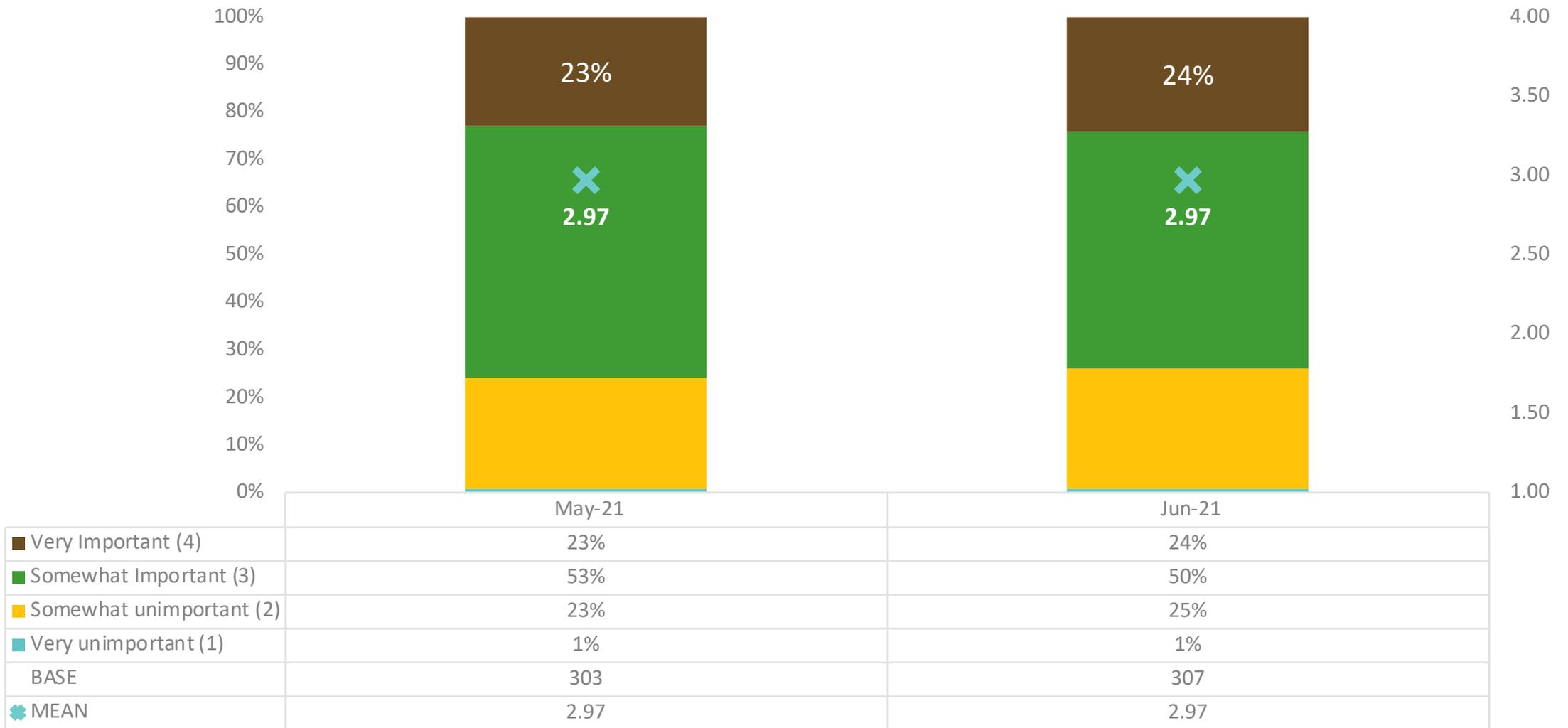
# POST-COVID SELECTION FACTOR

## Rural/ natural open areas



# POST-COVID SELECTION FACTOR

## Relatively low population density



# POST-COVID SELECTION FACTOR

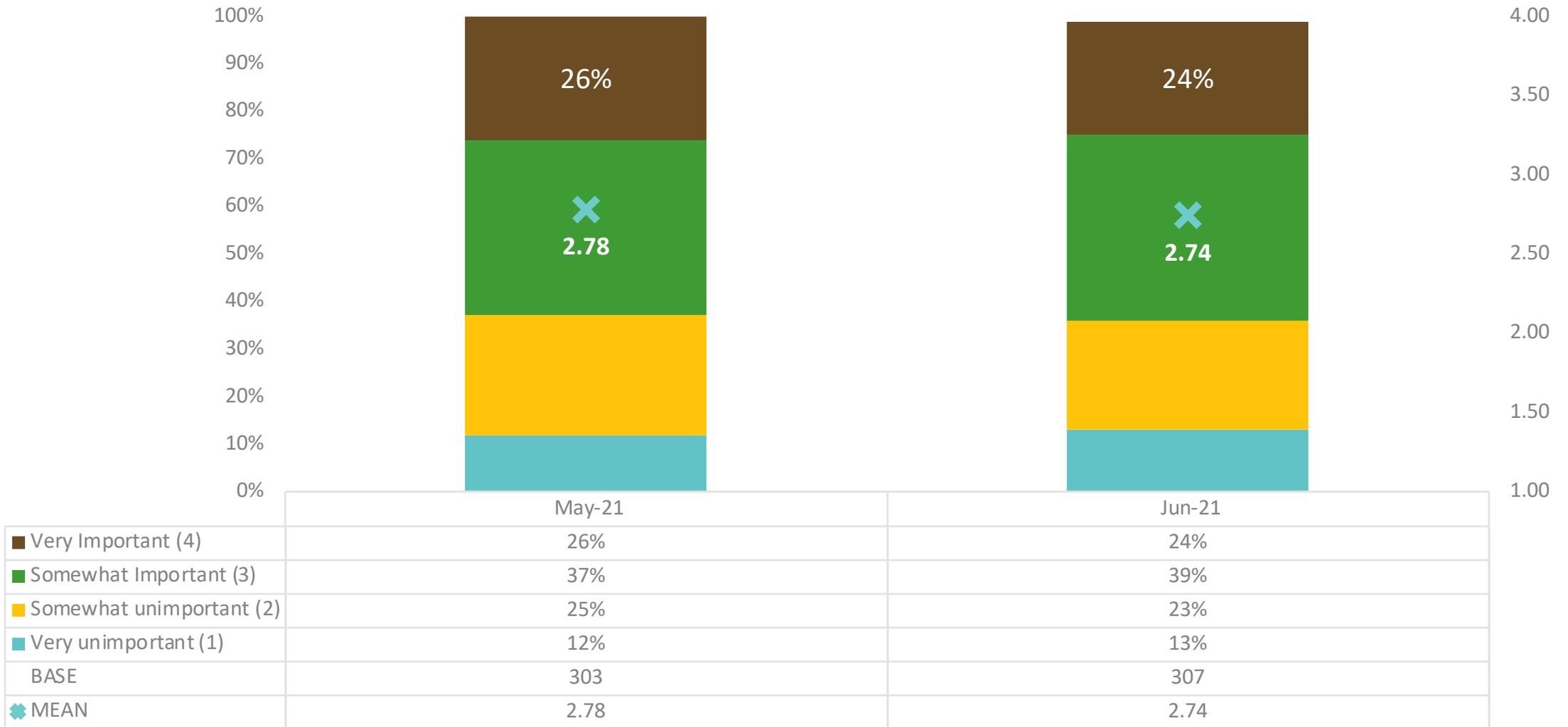
## Secondary cities of interest



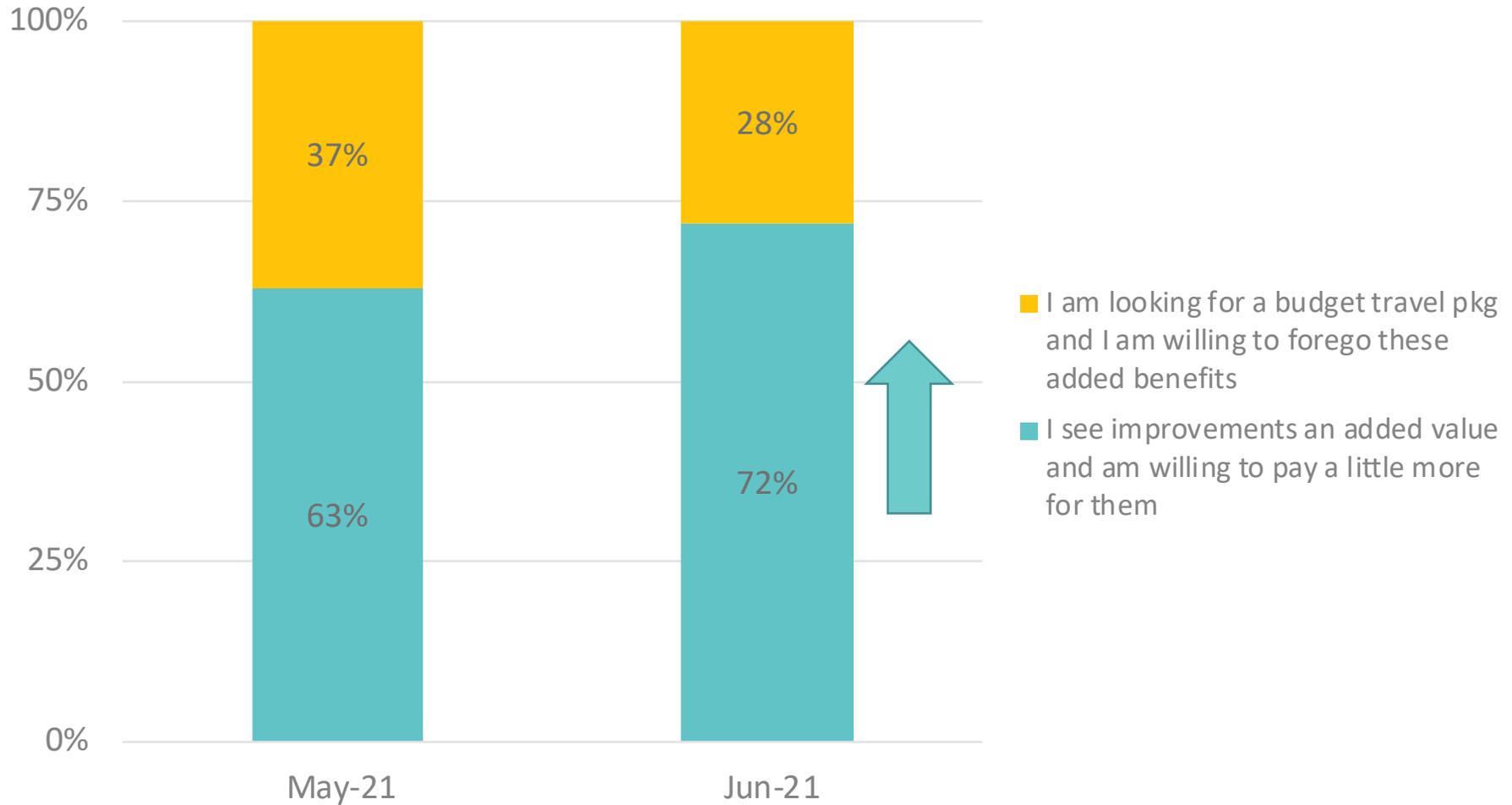
	May-21	Jun-21
Very Important (4)	18%	22%
Somewhat Important (3)	63%	51%
Somewhat unimportant (2)	18%	26%
Very unimportant (1)	1%	0%
BASE	303	307
MEAN	2.98	2.95

# POST-COVID SELECTION FACTOR

## No quarantine of any kind for visitors

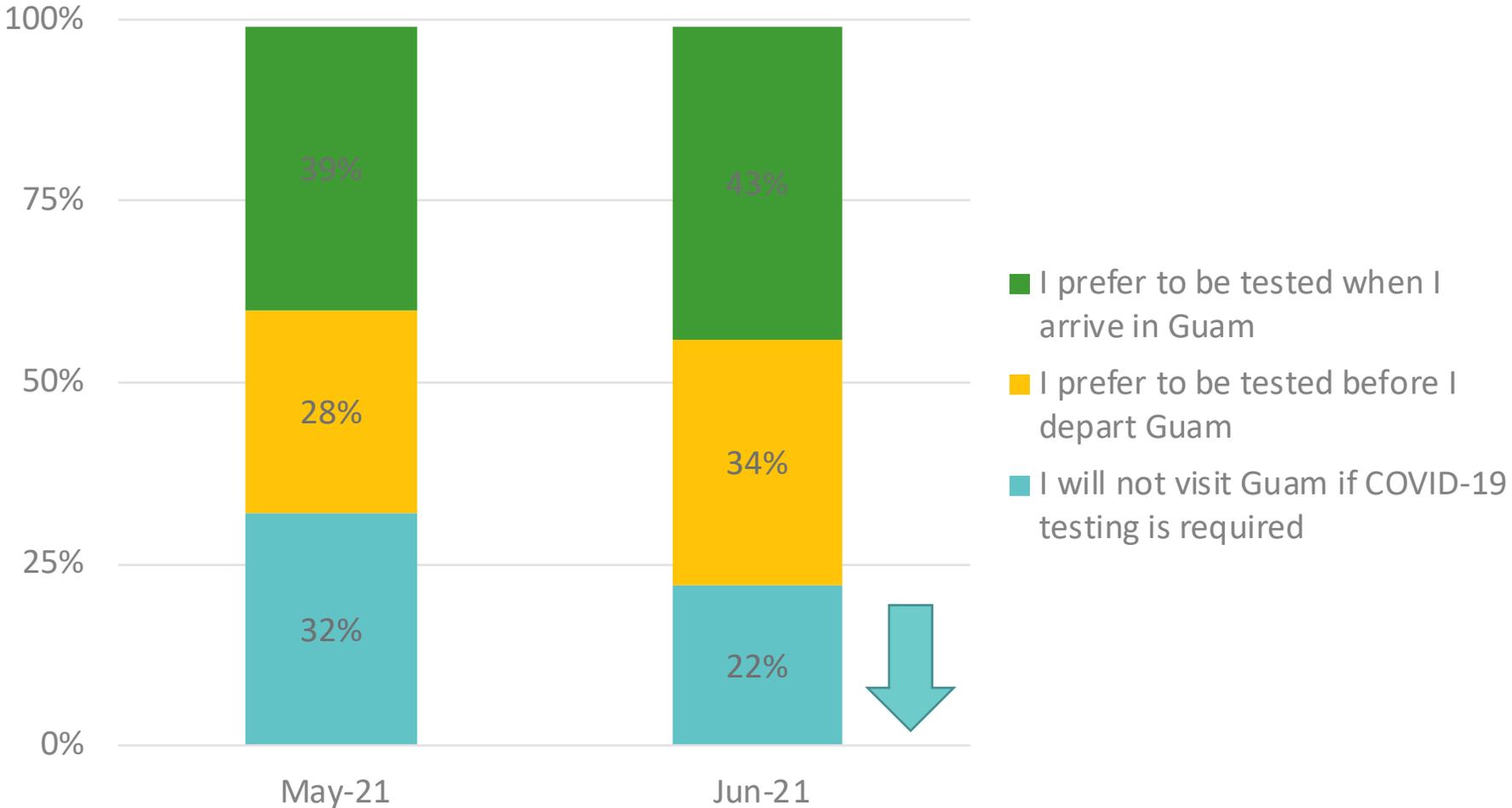


# GUAM AIRPORT COVID-19 SAFETY MEASURES



Q: In light of the COVID-19 pandemic, Guam has plans to implement numerous safety measures at the airport, including digital/ touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process. Which of the following best describes your reaction to these improvements?

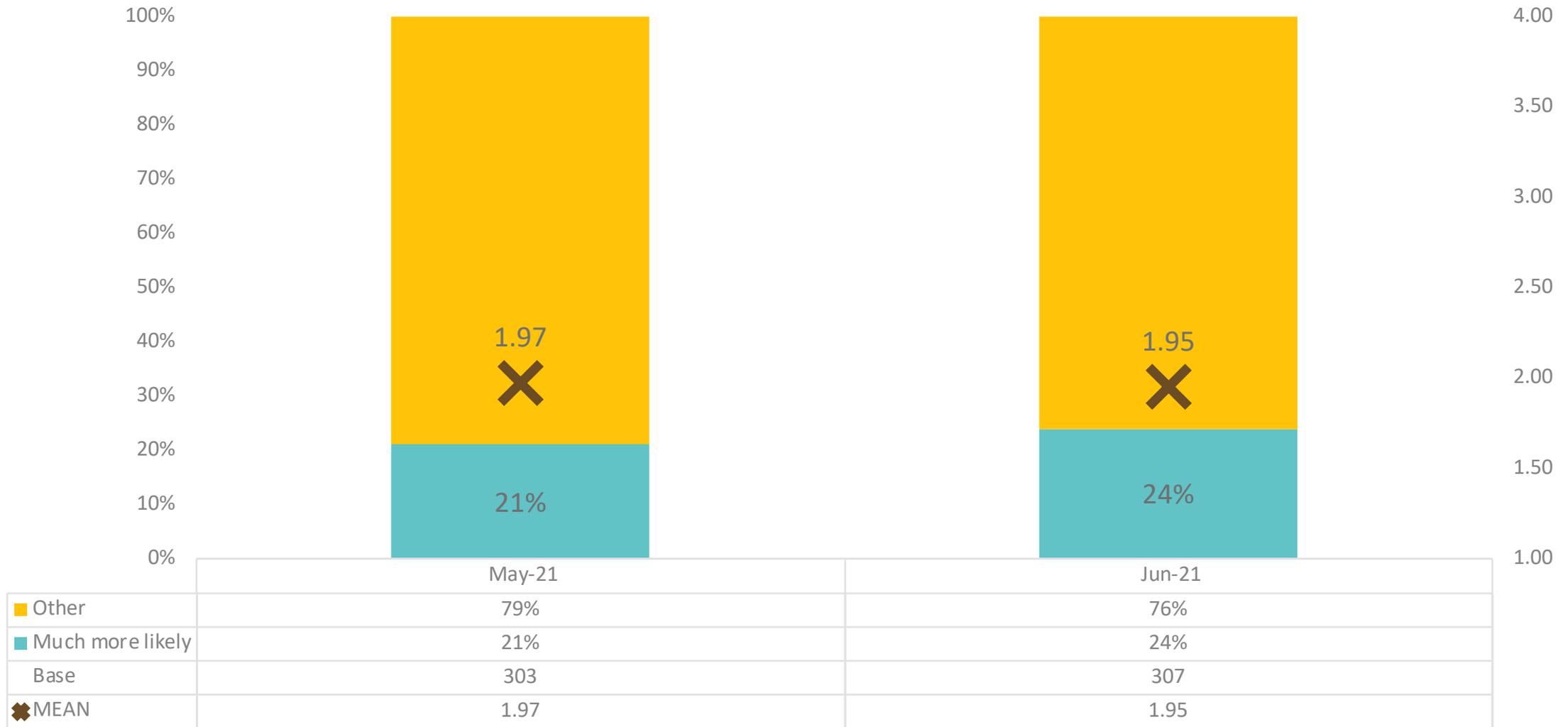
# ON-ISLE COVID-19 TESTING PREFERENCE



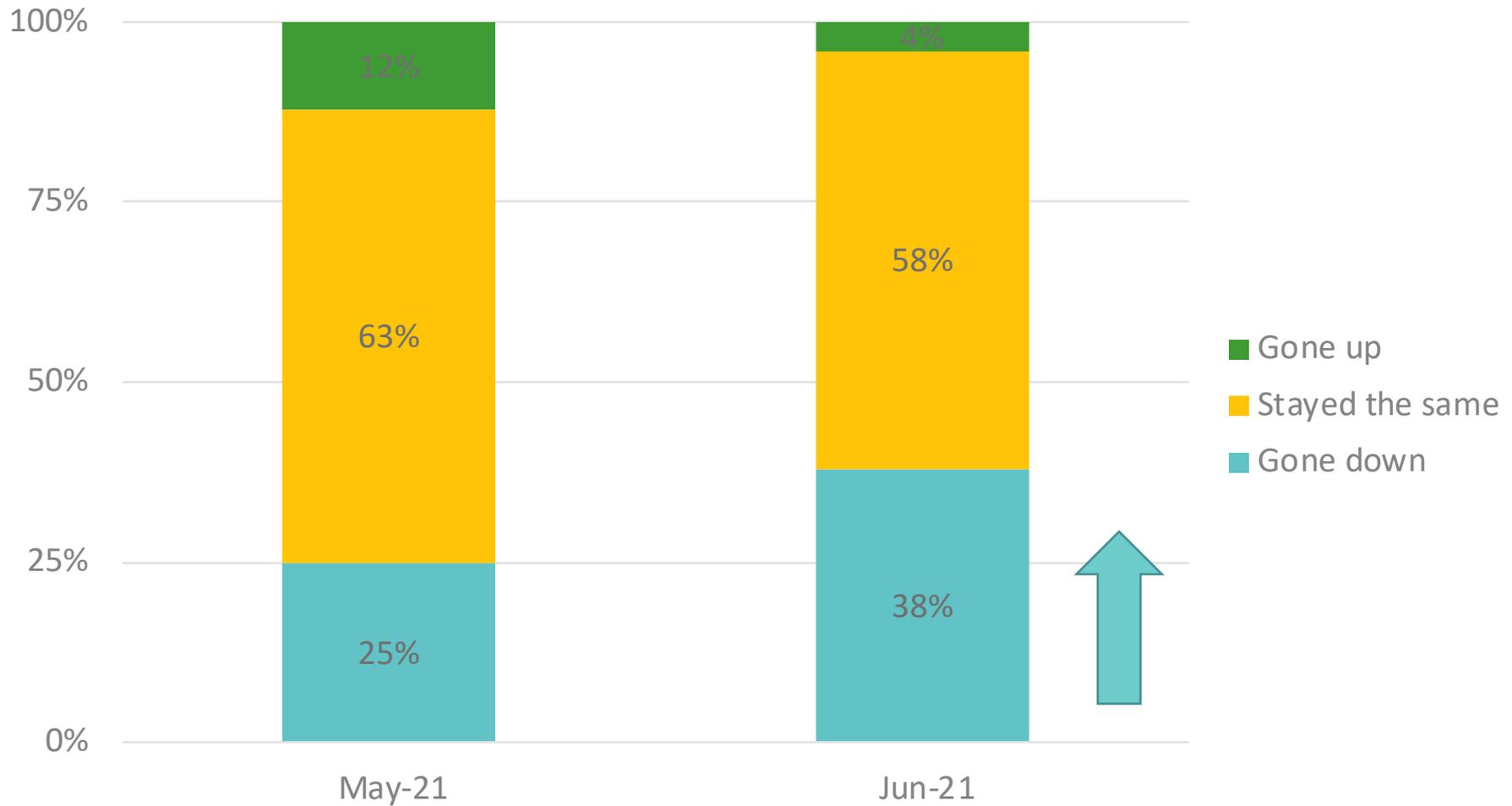
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



# IMPACT ON TRAVEL – FDA APPROVED COVID TEST



# CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



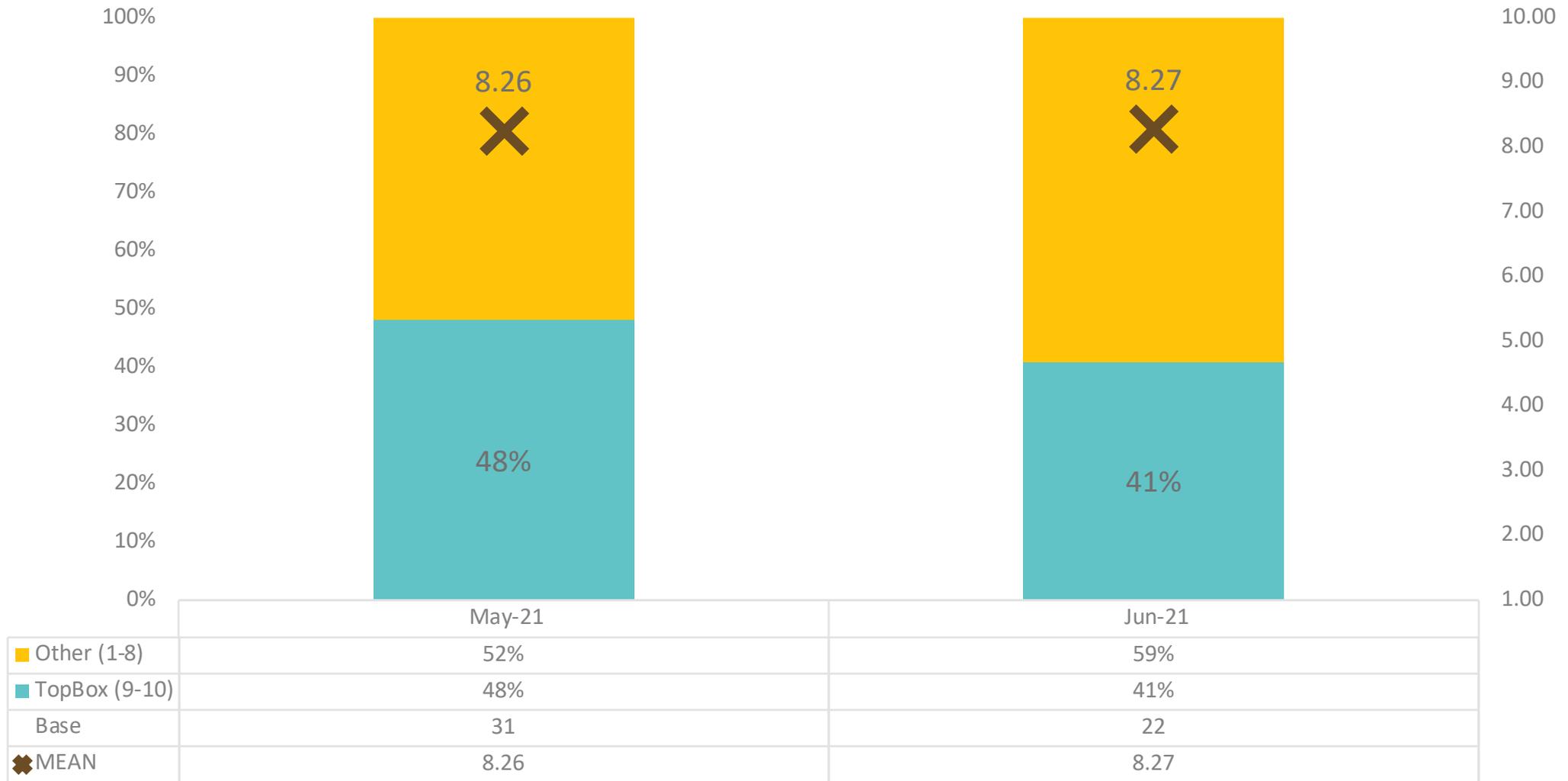


SECTION 3

# VISITOR SATISFACTION



# OVERALL SATISFACTION – 10PT SCALE



Caution  
small  
base



# PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021
BASE	31	22
Vacation/ pleasure	81%	77%
Incentive trip	6%	14%
Visit family/ friends	3%	-
Honeymoon	6%	-
Get married/ wedding	-	5%
Business/ conference/ convention/ trade show	3%	5%



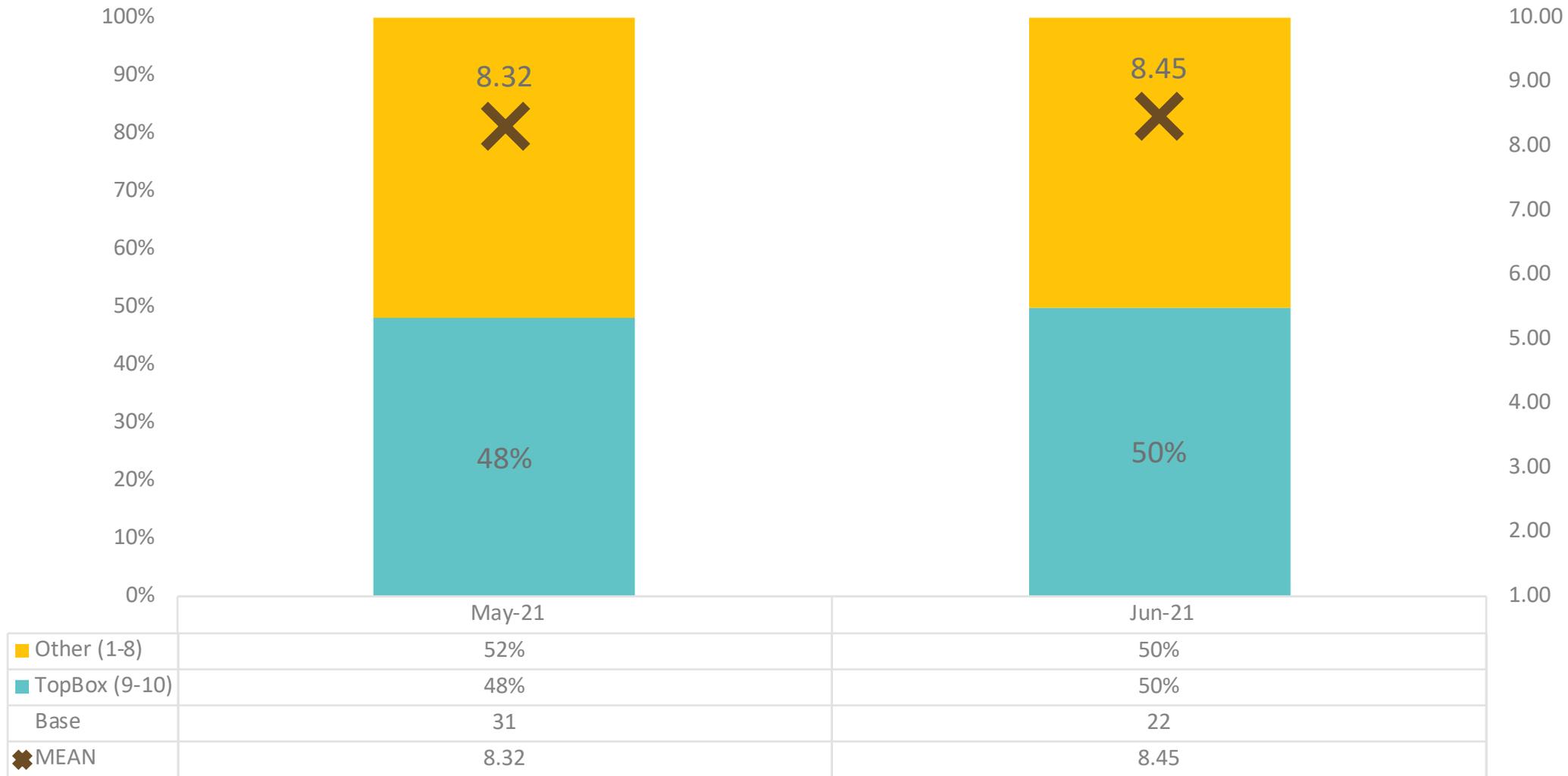
# TRAVEL MOTIVATIONS – TOP 3

	May-21	Jun-21
BASE	31	22
Beautiful seas, beaches, tropical climate	58%	50%
Safe place to spend a vacation	52%	55%
Relaxation	42%	18%
Sightseeing	39%	32%
Prior trip	26%	23%
Price	19%	36%
Recommendations	19%	14%
Water activities	13%	18%
Short travel time	10%	23%
Shopping	10%	9%

Caution  
small  
base



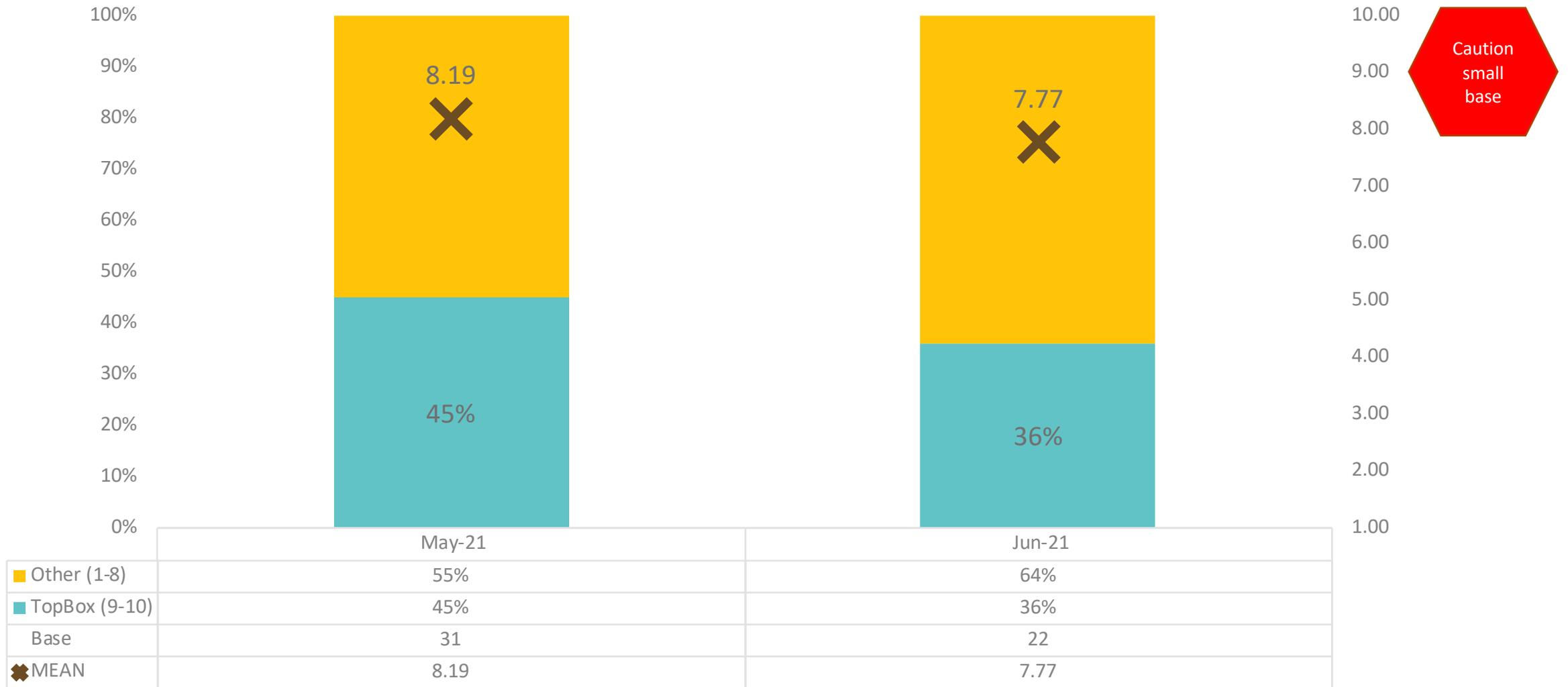
# BRAND ADVOCACY – 10PT SCALE



Caution  
small  
base



# BRAND LOYALTY – 10PT SCALE



# GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021
BASE	31	22
<i>Nature/ natural beauty/ scenery</i>	58%	64%
<i>Beach/ ocean</i>	45%	55%
<i>Weather/ climate/ good atmosphere/ fresh air</i>	45%	55%
<i>Relaxation</i>	52%	36%
<i>Food – quality/ variety/ service</i>	39%	41%
<i>Local culture/ people/ music</i>	23%	55%
<i>Safe environment</i>	45%	23%
<i>Sightseeing</i>	35%	27%
<i>Variety of activities</i>	29%	32%
<i>Overall customer service</i>	35%	23%
<i>Feeling the Hafa Adai spirit</i>	23%	36%
<i>Event- I observed or participated in</i>	29%	18%
<i>Hotel/ accommodations</i>	23%	23%
<i>Shopping</i>	26%	18%

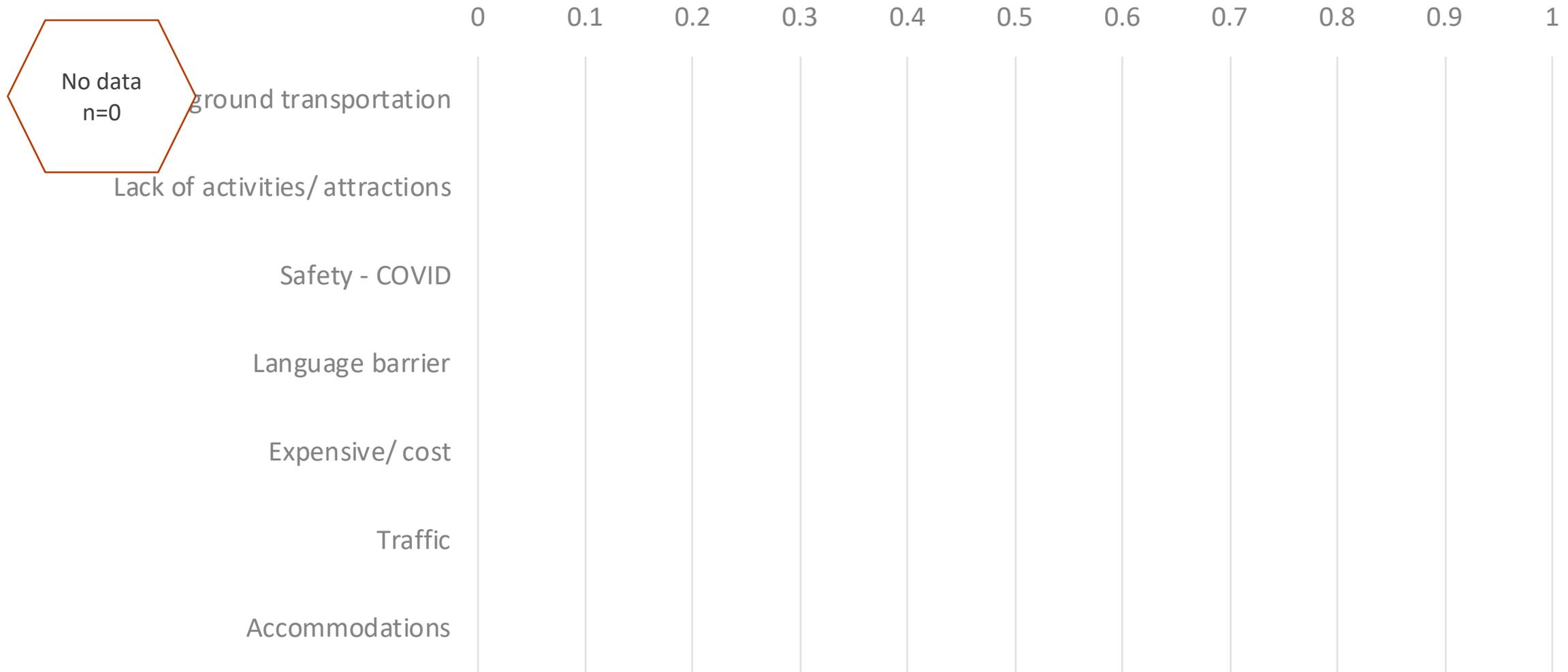


# GUAM TRAVELERS – DRAWBACKS

	May 2021	June 2021
BASE	31	22
<i>No negatives</i>	32%	32%
<i>Limited availability of ground transportation</i>	23%	18%
<i>Language barrier/ communication</i>	19%	23%
<i>Expensive/ high costs</i>	16%	23%
<i>Immigration</i>	10%	18%
<i>Food – quality/ variety/ service</i>	16%	5%
<i>Lack of activities/ attractions</i>	13%	5%
<i>Safety - COVID</i>	10%	9%
<i>Safety - Other</i>	10%	9%
<i>Unfriendly locals</i>	10%	5%
<i>Accommodations</i>	3%	14%

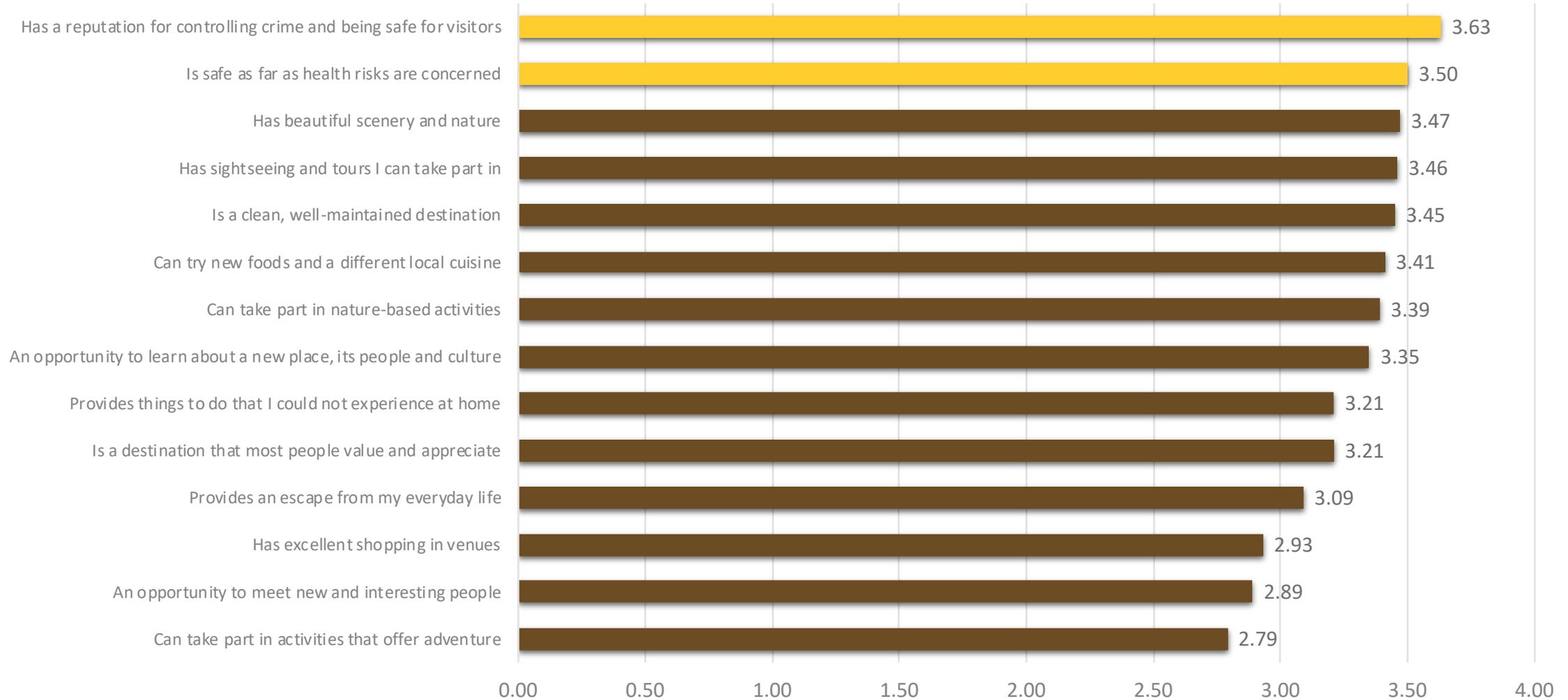


# UNLIKELY TO RETURN – REASONS



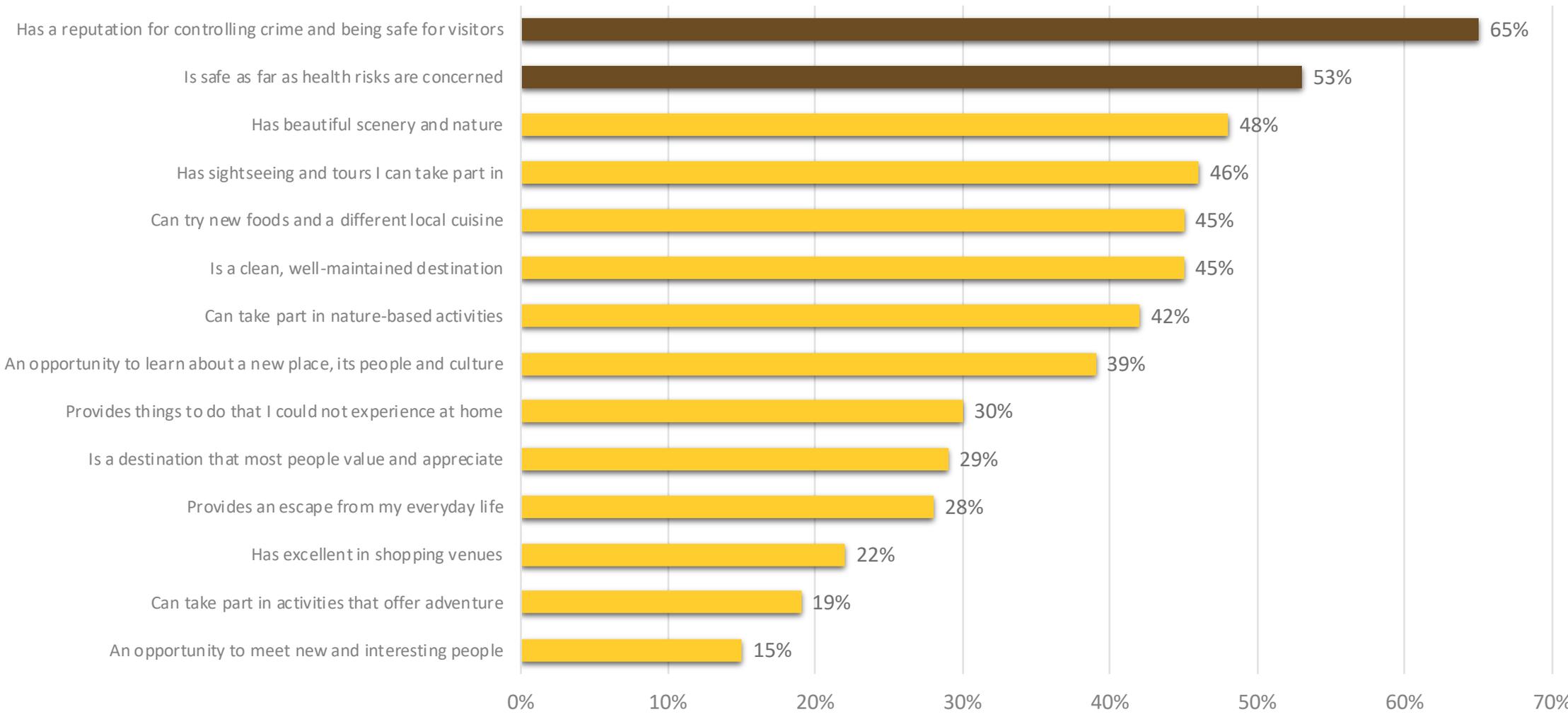
# SELECTION FACTORS – SATISFACTION

## MEAN SCORES 4PT SCALE

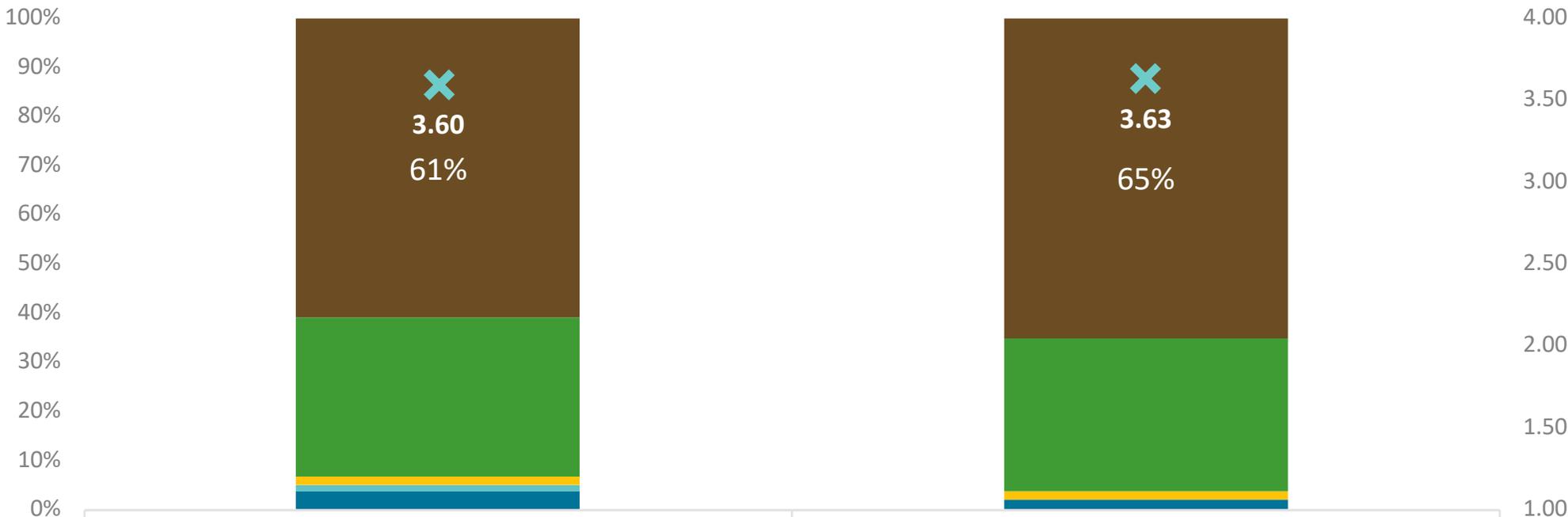


# SELECTION FACTORS – SATISFACTION

## TOP BOX (VERY GOOD)



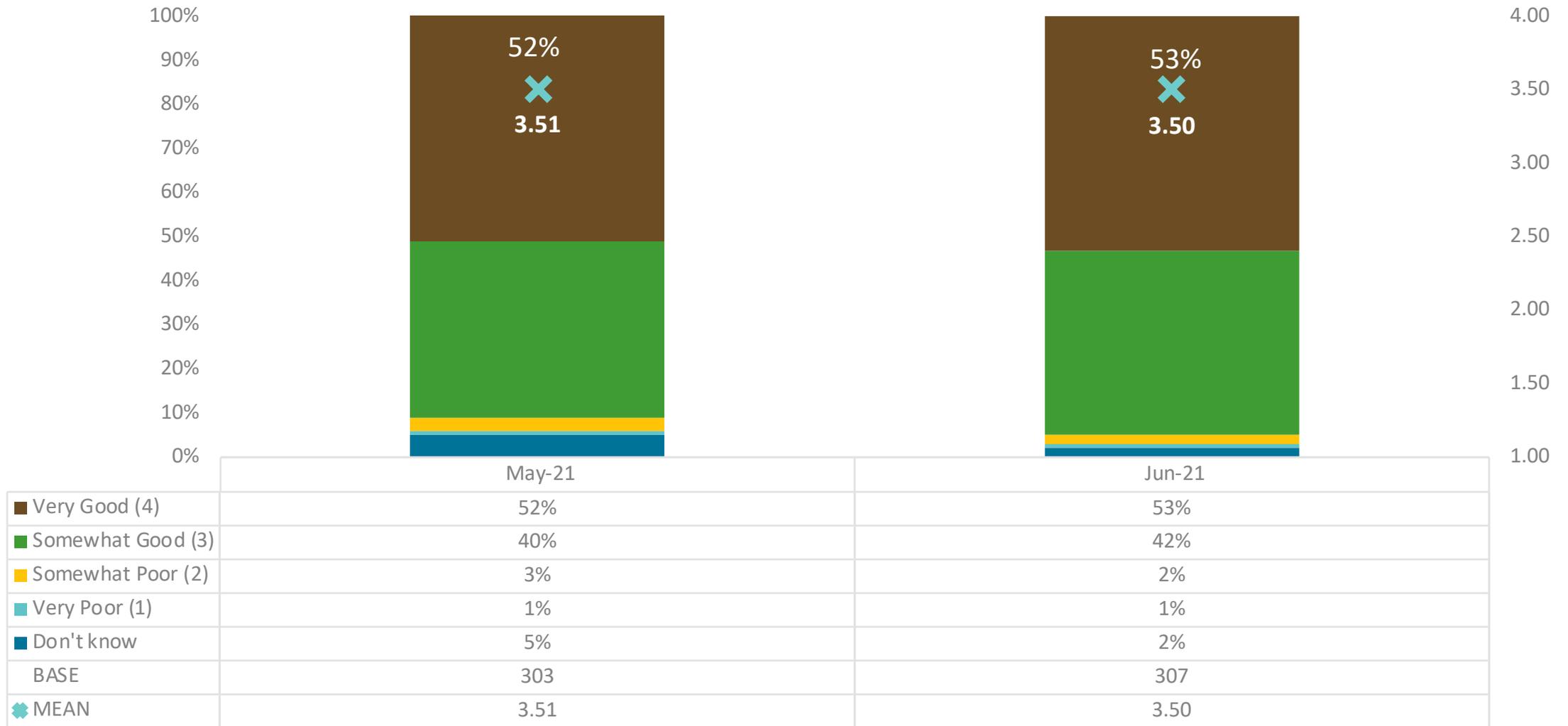
# Has a reputation for controlling crime and being safe for visitors



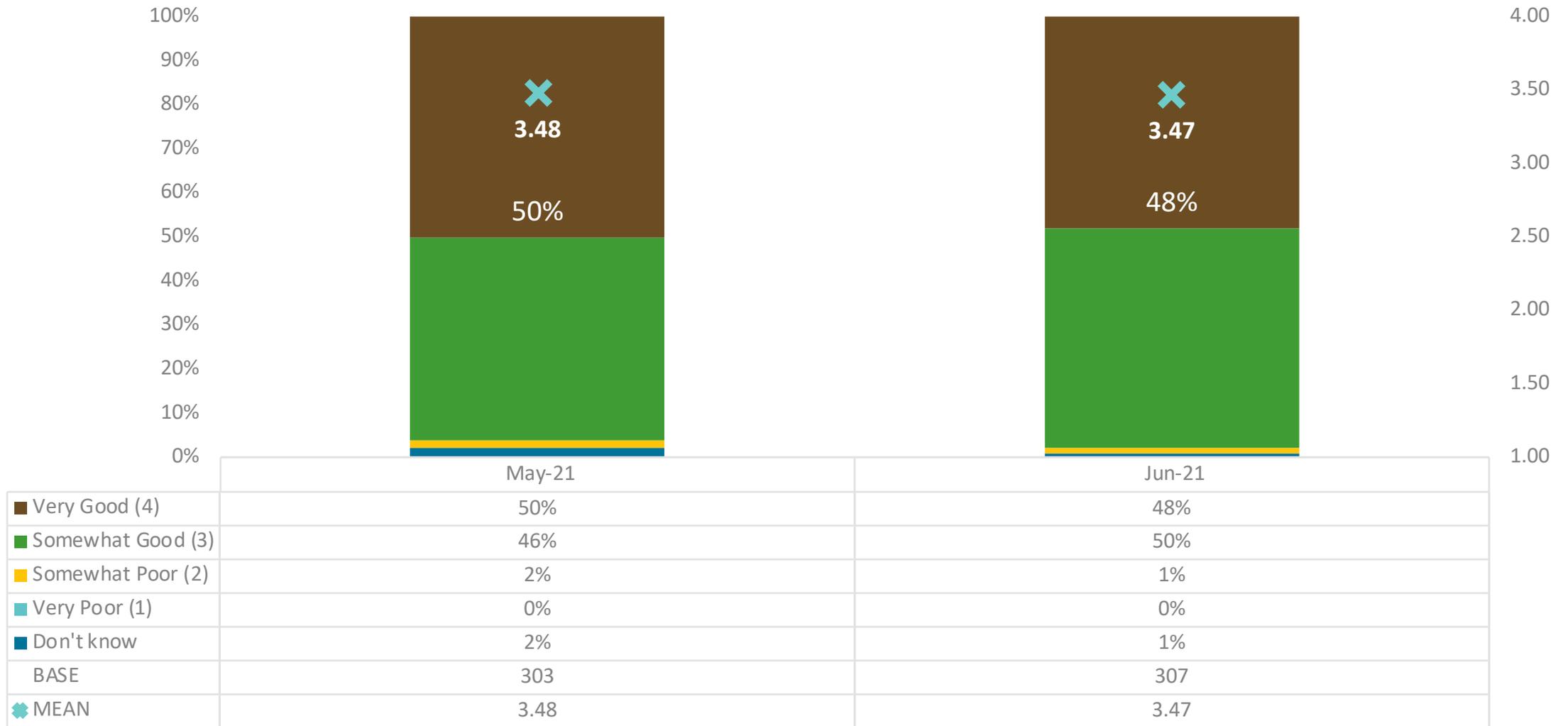
	May-21	Jun-21
Very Good (4)	61%	65%
Somewhat Good (3)	32%	31%
Somewhat Poor (2)	2%	2%
Very Poor (1)	1%	0%
Don't know	4%	2%
BASE	303	307
MEAN	3.60	3.63



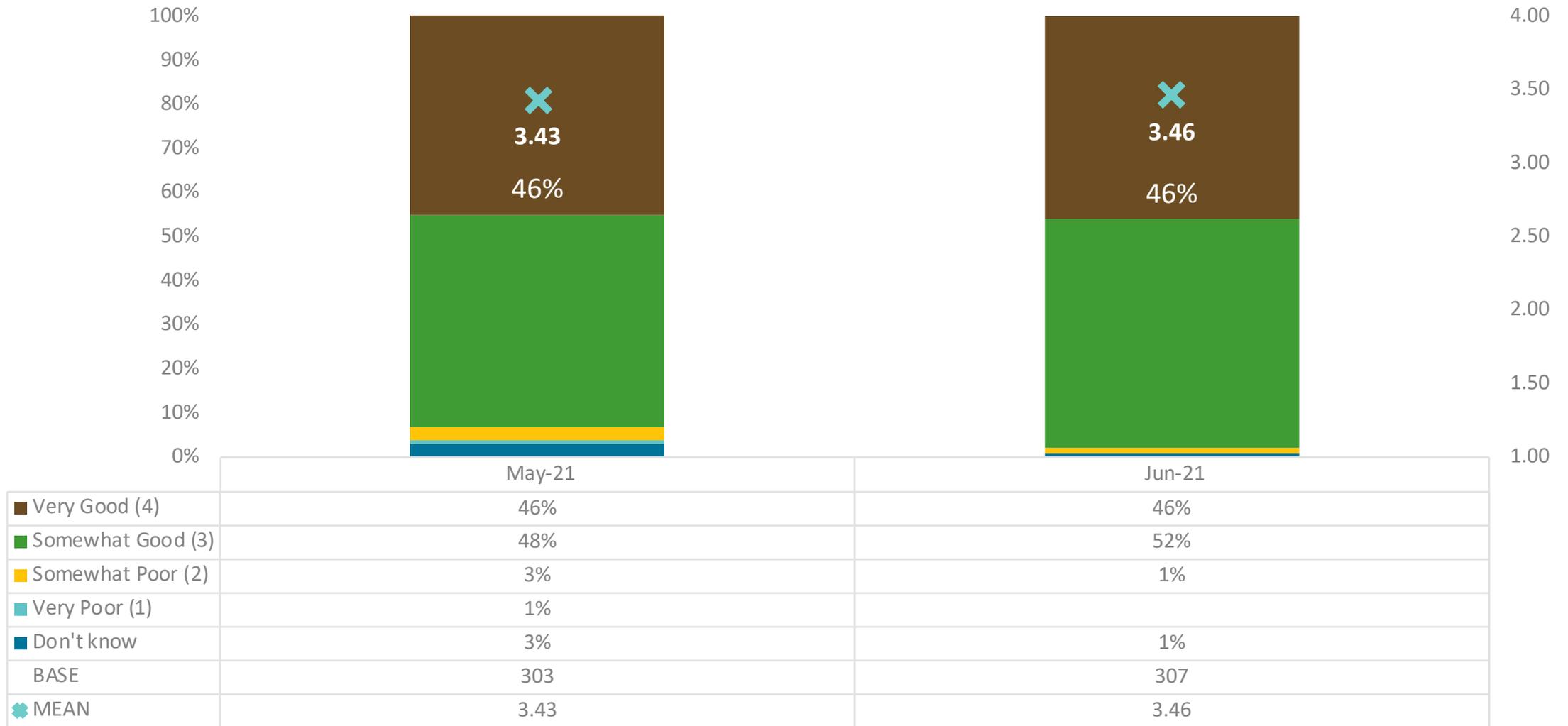
# Is safe as far as health risks are concerned



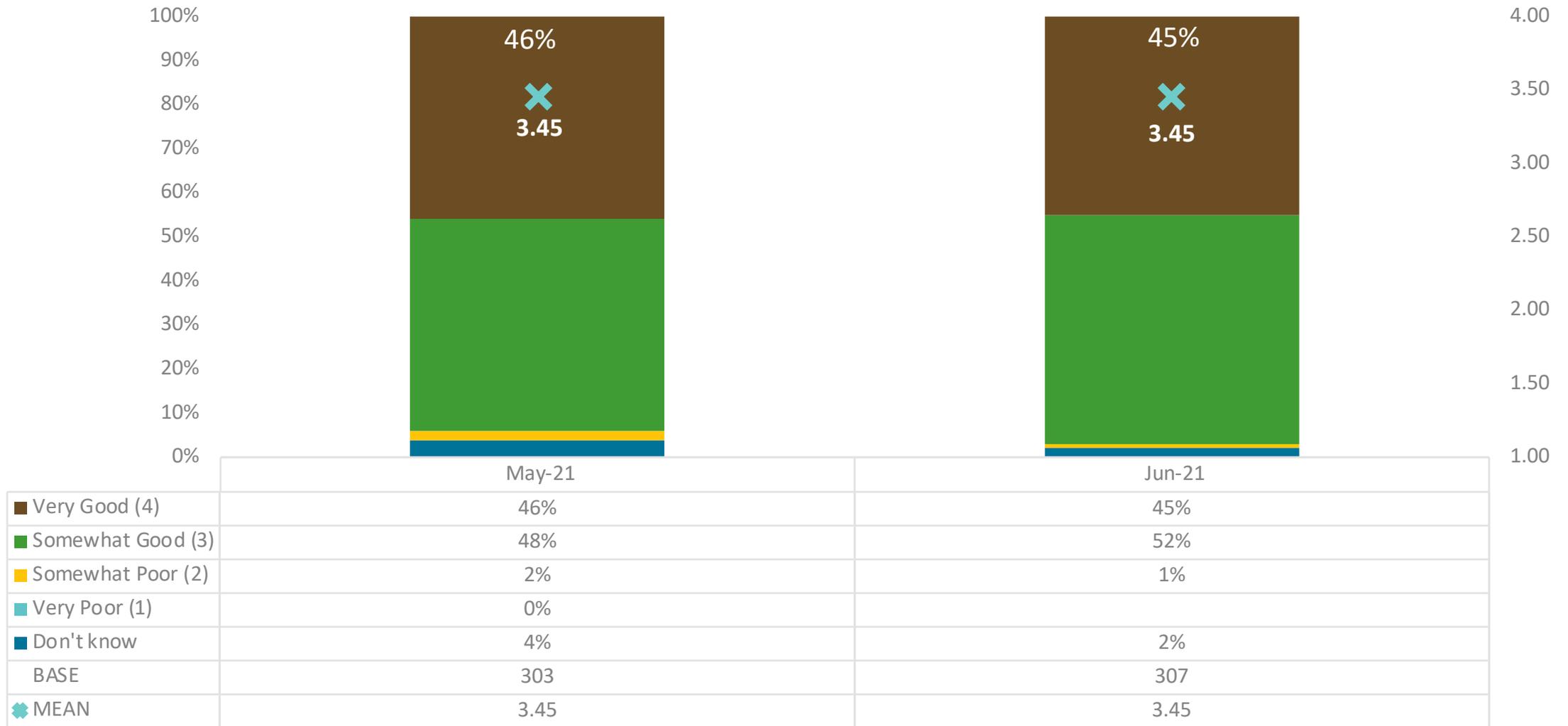
# Has beautiful scenery and nature



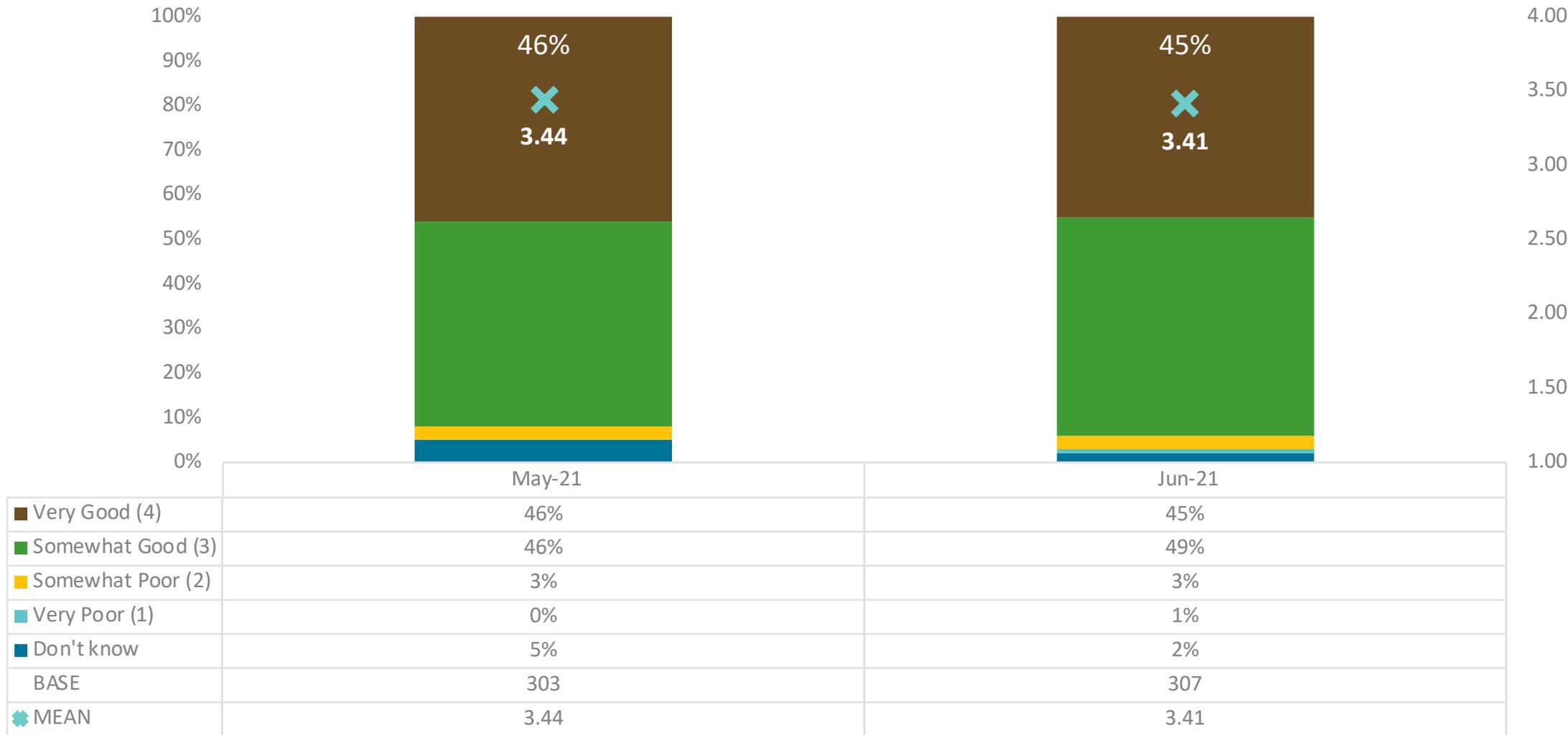
# Has sightseeing and tours I can take part in



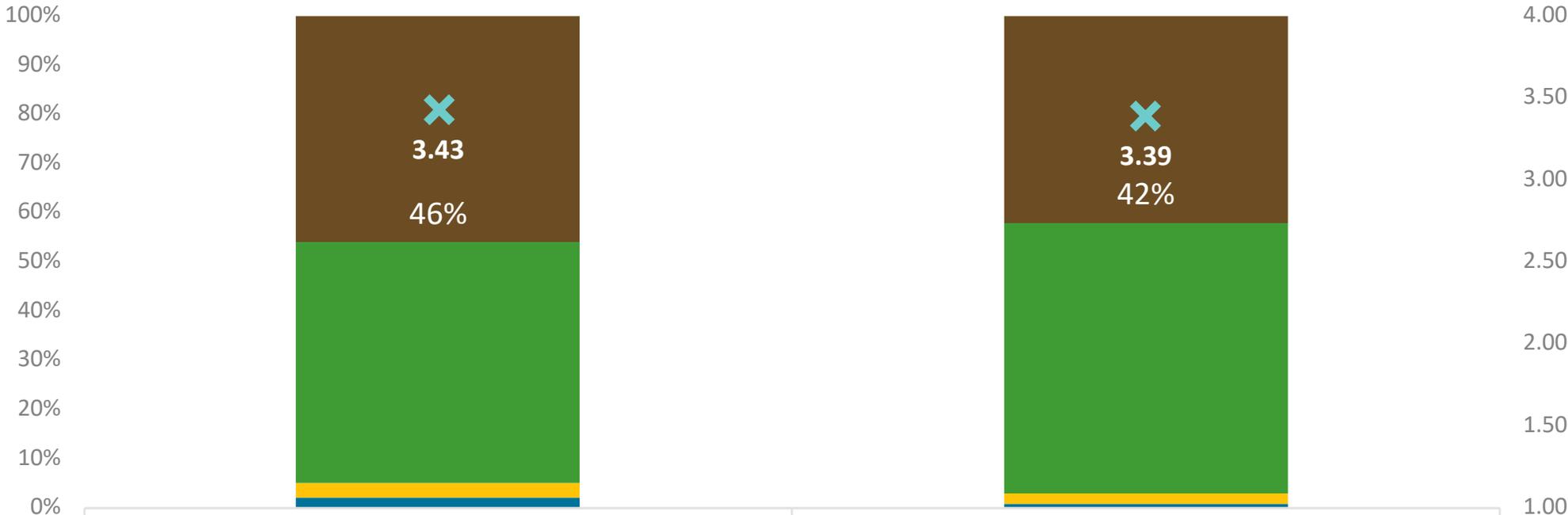
# Is a clean, well-maintained destination



# Can try new foods and a different local cuisine

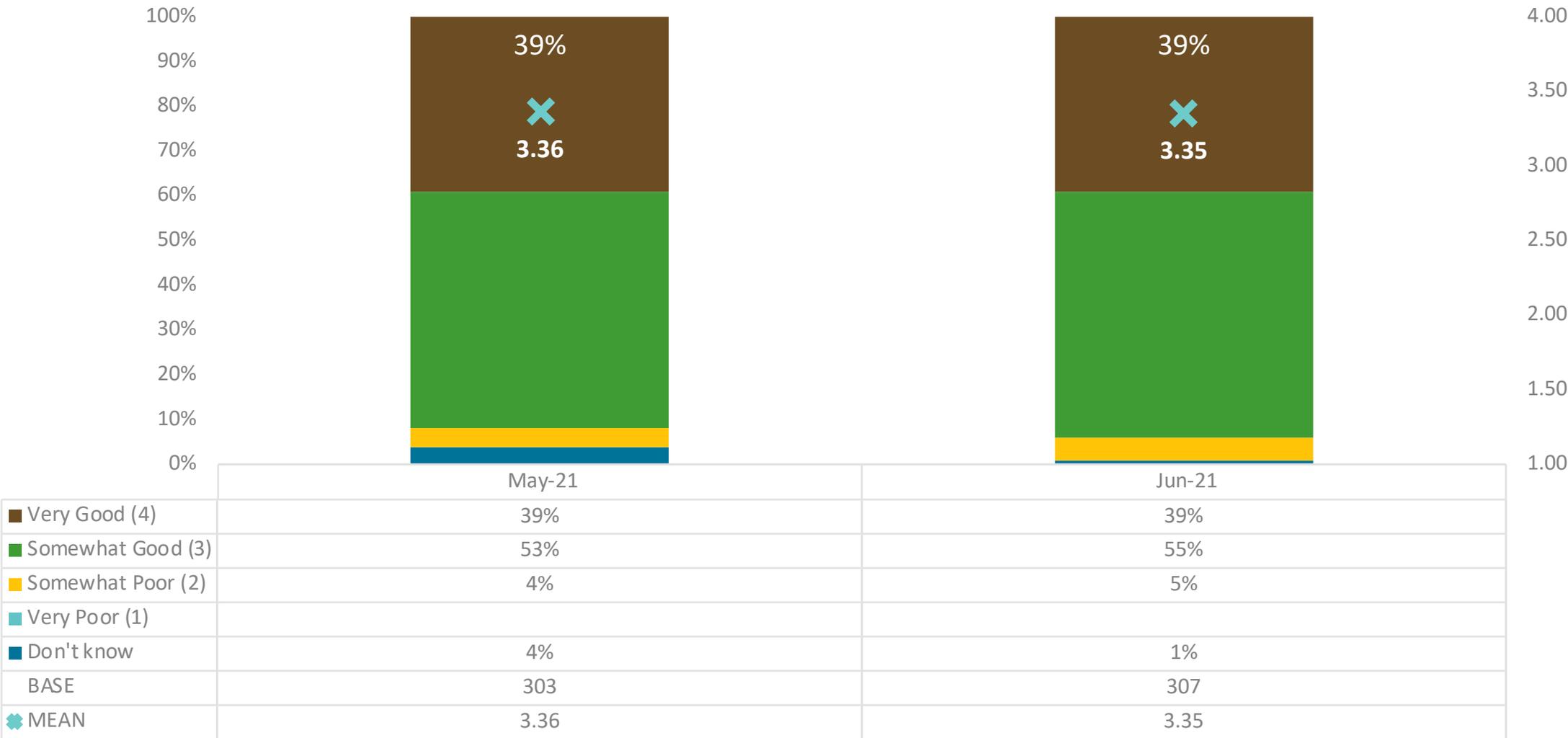


# Can take part in nature-based activities

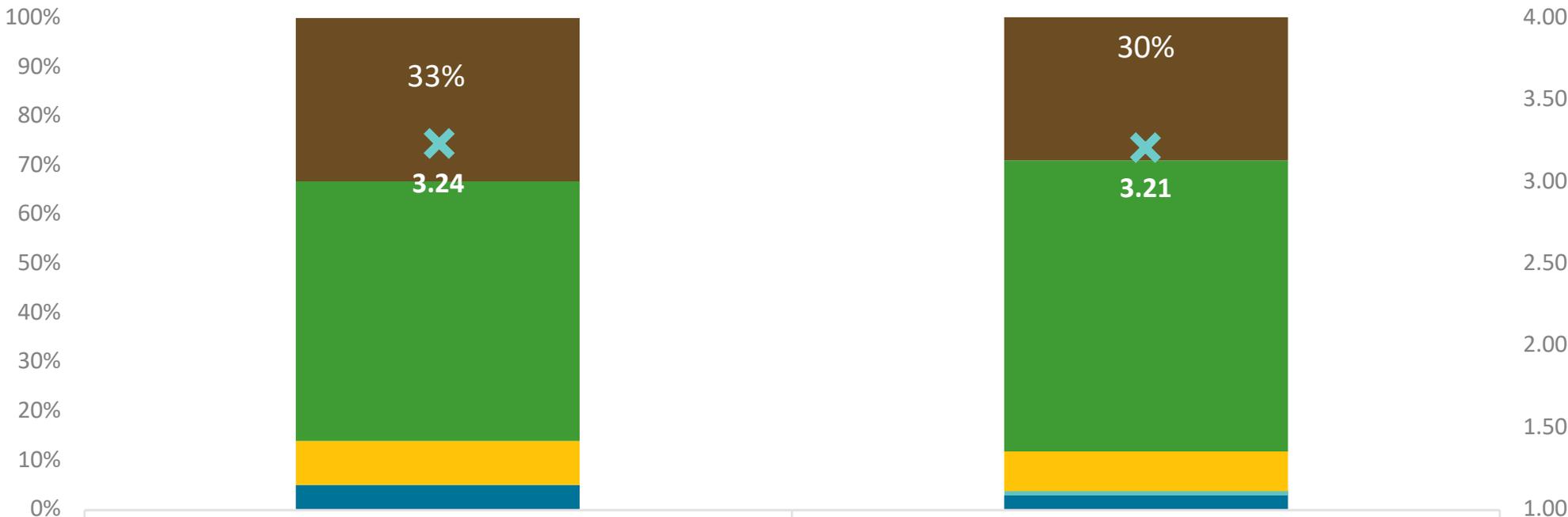


	May-21	Jun-21
Very Good (4)	46%	42%
Somewhat Good (3)	49%	55%
Somewhat Poor (2)	3%	2%
Very Poor (1)	0%	0%
Don't know	2%	1%
BASE	303	307
MEAN	3.43	3.39

# An opportunity to learn about a new place, its people and culture



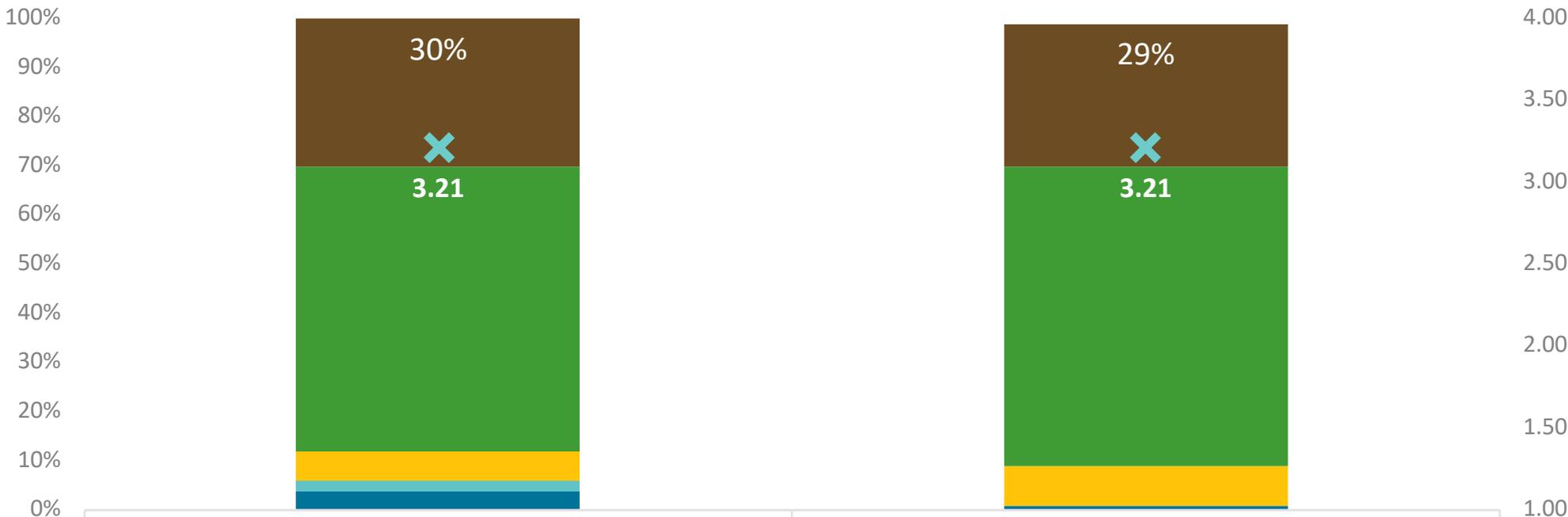
# Provides things to do that I could not experience at home



	May-21	Jun-21
Very Good (4)	33%	30%
Somewhat Good (3)	53%	59%
Somewhat Poor (2)	9%	8%
Very Poor (1)	0%	1%
Don't know	5%	3%
BASE	303	307
MEAN	3.24	3.21



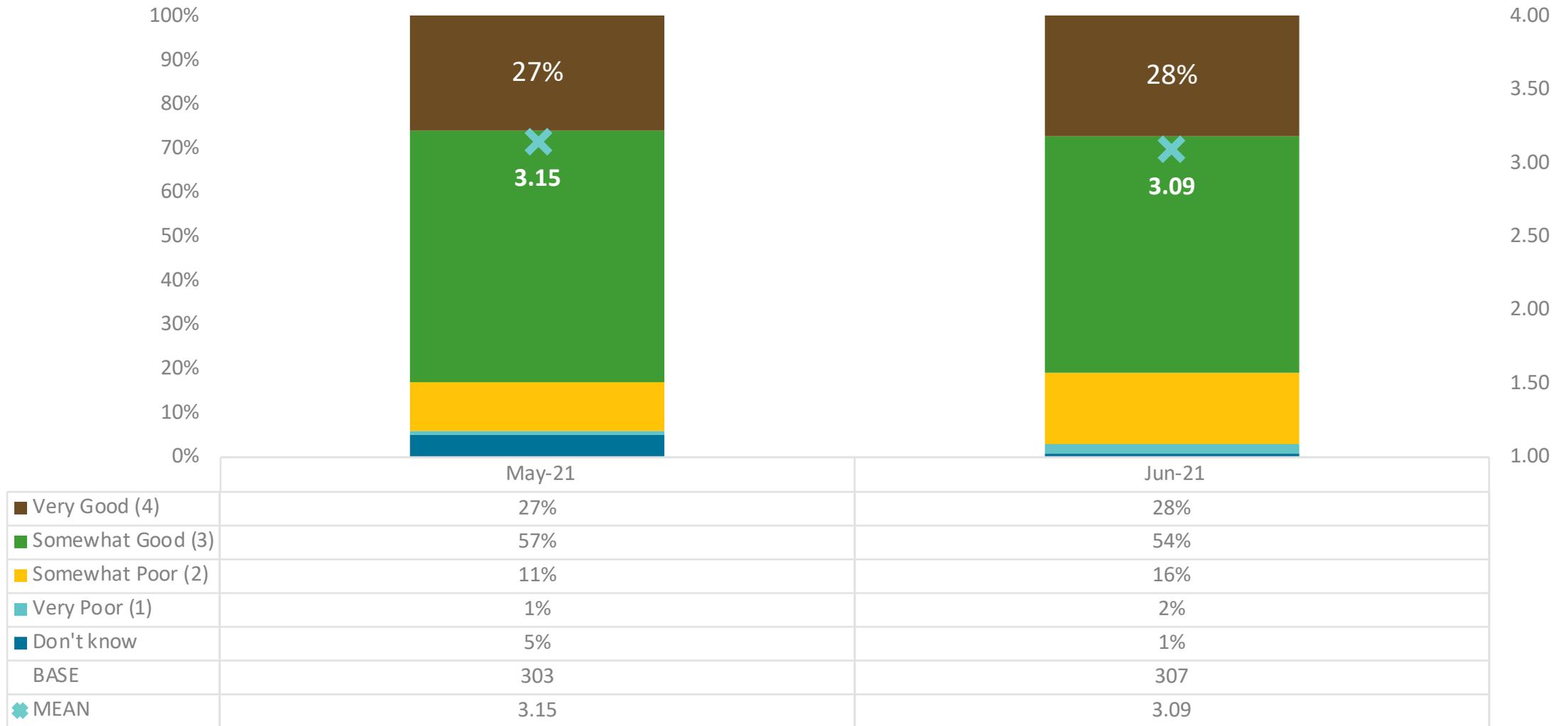
# Is a destination that most people value and appreciate



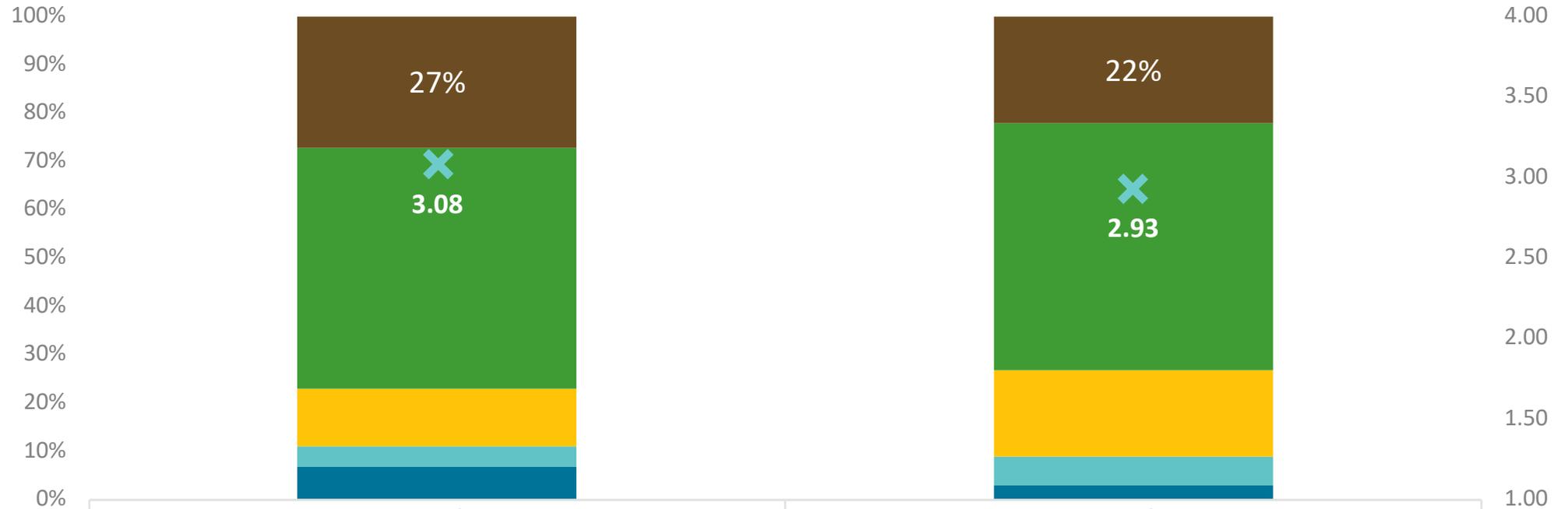
	May-21	Jun-21
Very Good (4)	30%	29%
Somewhat Good (3)	58%	61%
Somewhat Poor (2)	6%	8%
Very Poor (1)	2%	0%
Don't know	4%	1%
BASE	303	307
MEAN	3.21	3.21



# Provides an escape from my everyday life

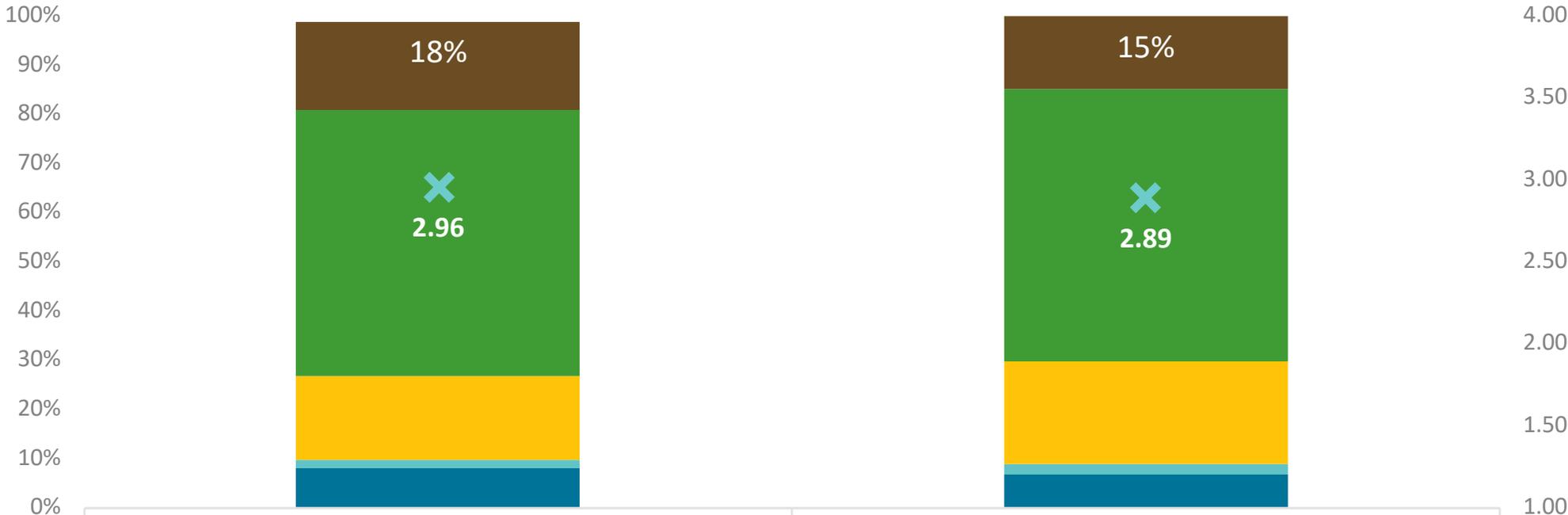


# Has excellent shopping in venues



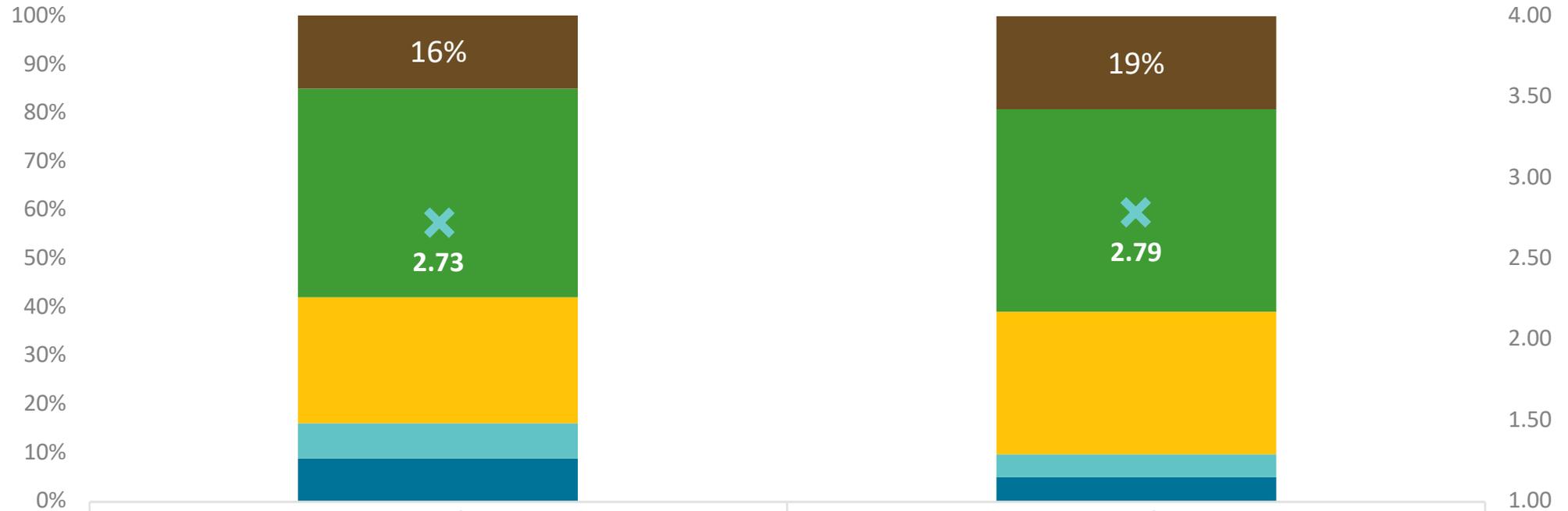
	May-21	Jun-21
Very Good (4)	27%	22%
Somewhat Good (3)	50%	51%
Somewhat Poor (2)	12%	18%
Very Poor (1)	4%	6%
Don't know	7%	3%
BASE	303	307
MEAN	3.08	2.93

# An opportunity to meet new and interesting people



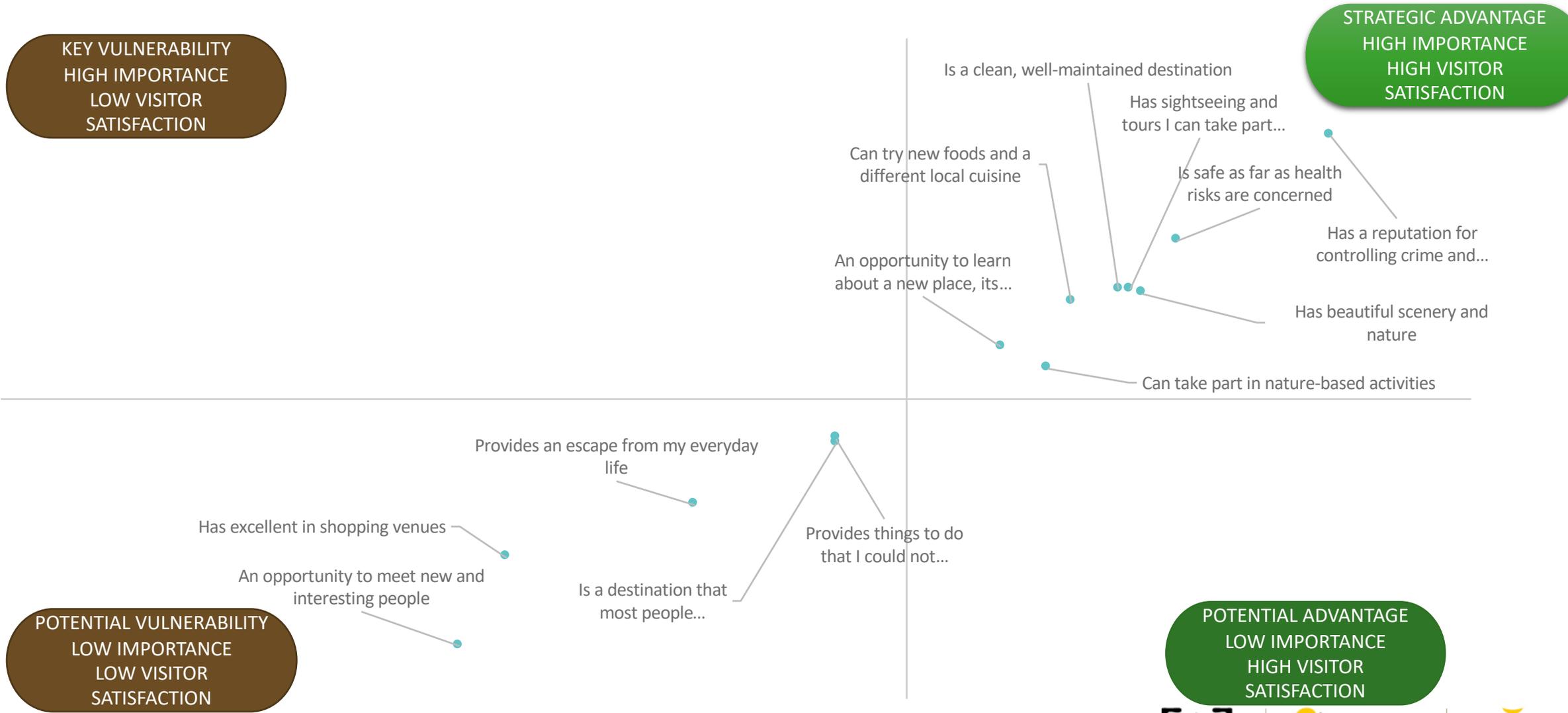
	May-21	Jun-21
Very Good (4)	18%	15%
Somewhat Good (3)	54%	55%
Somewhat Poor (2)	17%	21%
Very Poor (1)	2%	2%
Don't know	8%	7%
BASE	303	307
MEAN	2.96	2.89

# Can take part in activities that offer adventure



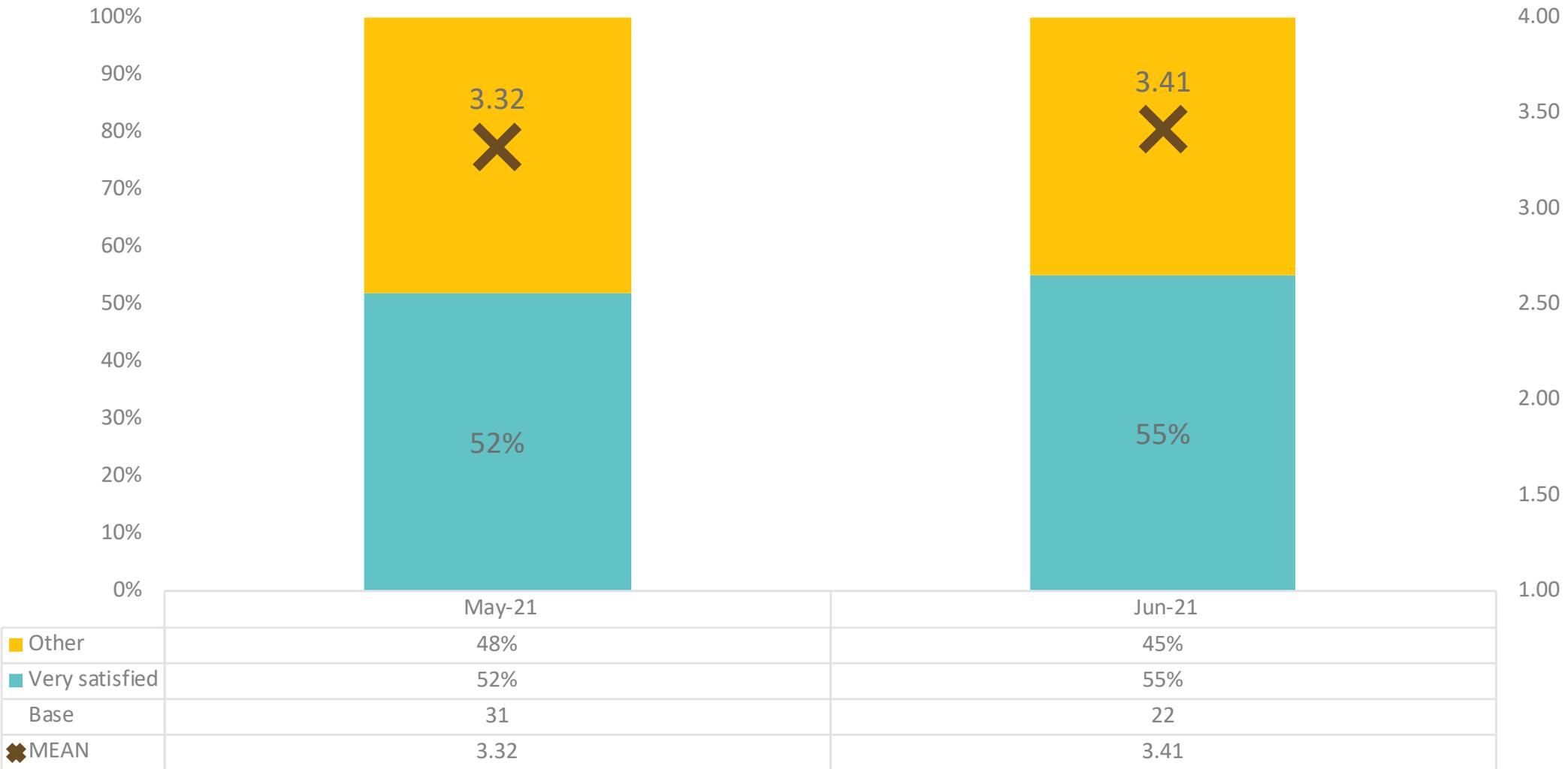
	May-21	Jun-21
Very Good (4)	16%	19%
Somewhat Good (3)	43%	42%
Somewhat Poor (2)	26%	29%
Very Poor (1)	7%	5%
Don't know	9%	5%
BASE	303	307
MEAN	2.73	2.79

# NEED-GAP ANALYSIS



# ACCOMMODATIONS – SATISFACTION

## 4PT RATING SCALE

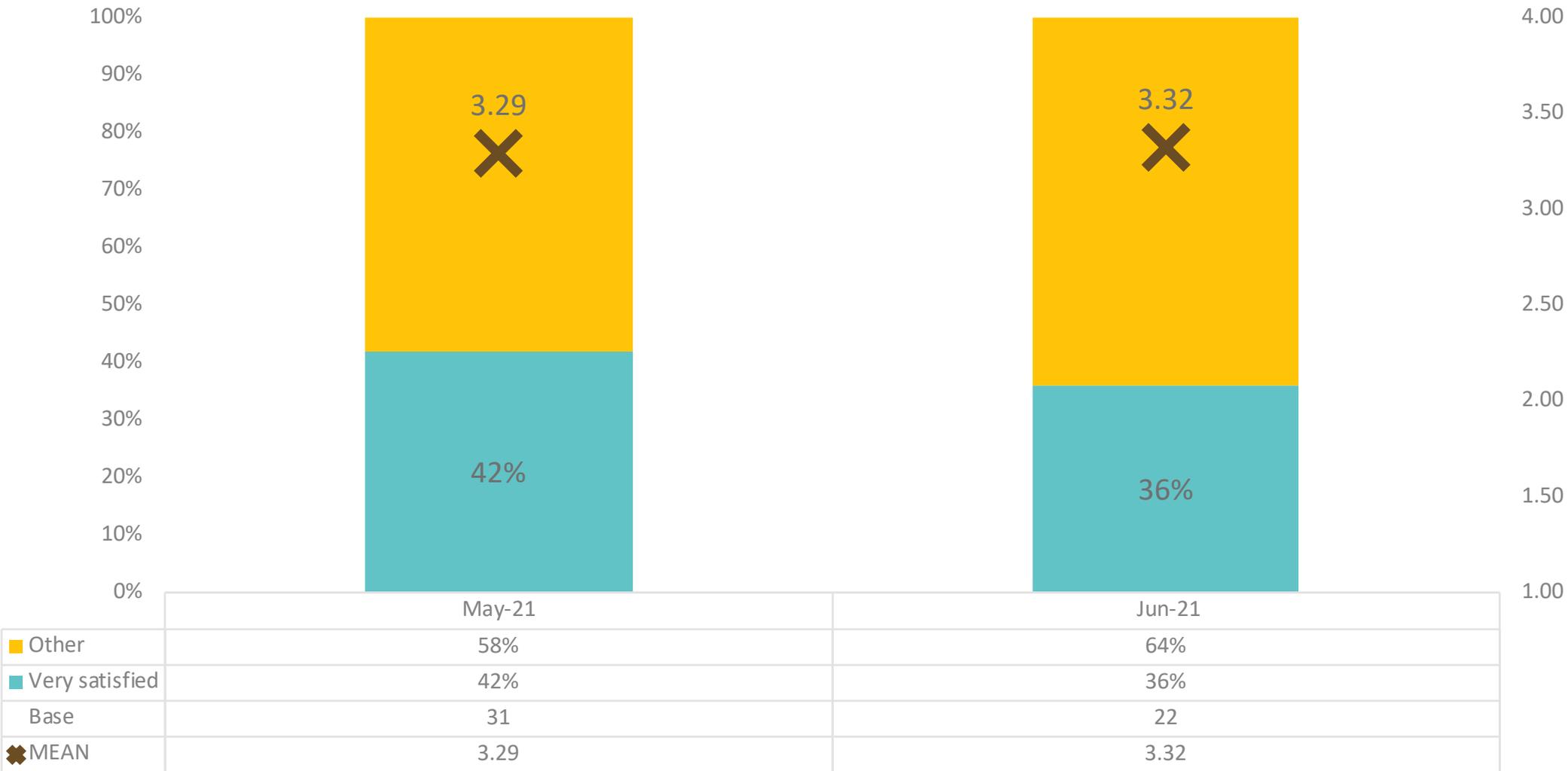


Caution  
small  
base



# QUALITY CUSTOMER SERVICE – SATISFACTION

## 4PT RATING SCALE

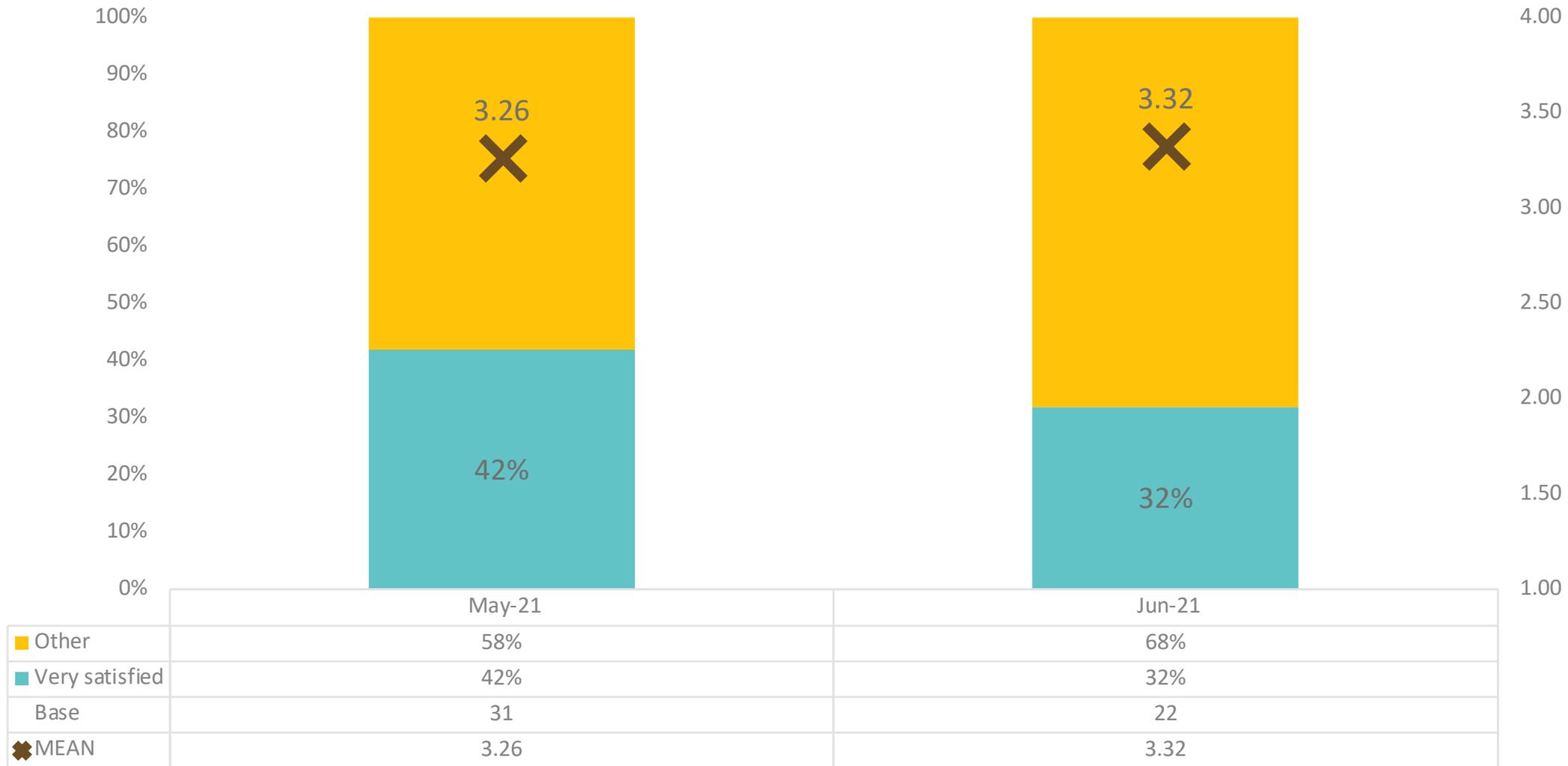


Caution  
small  
base



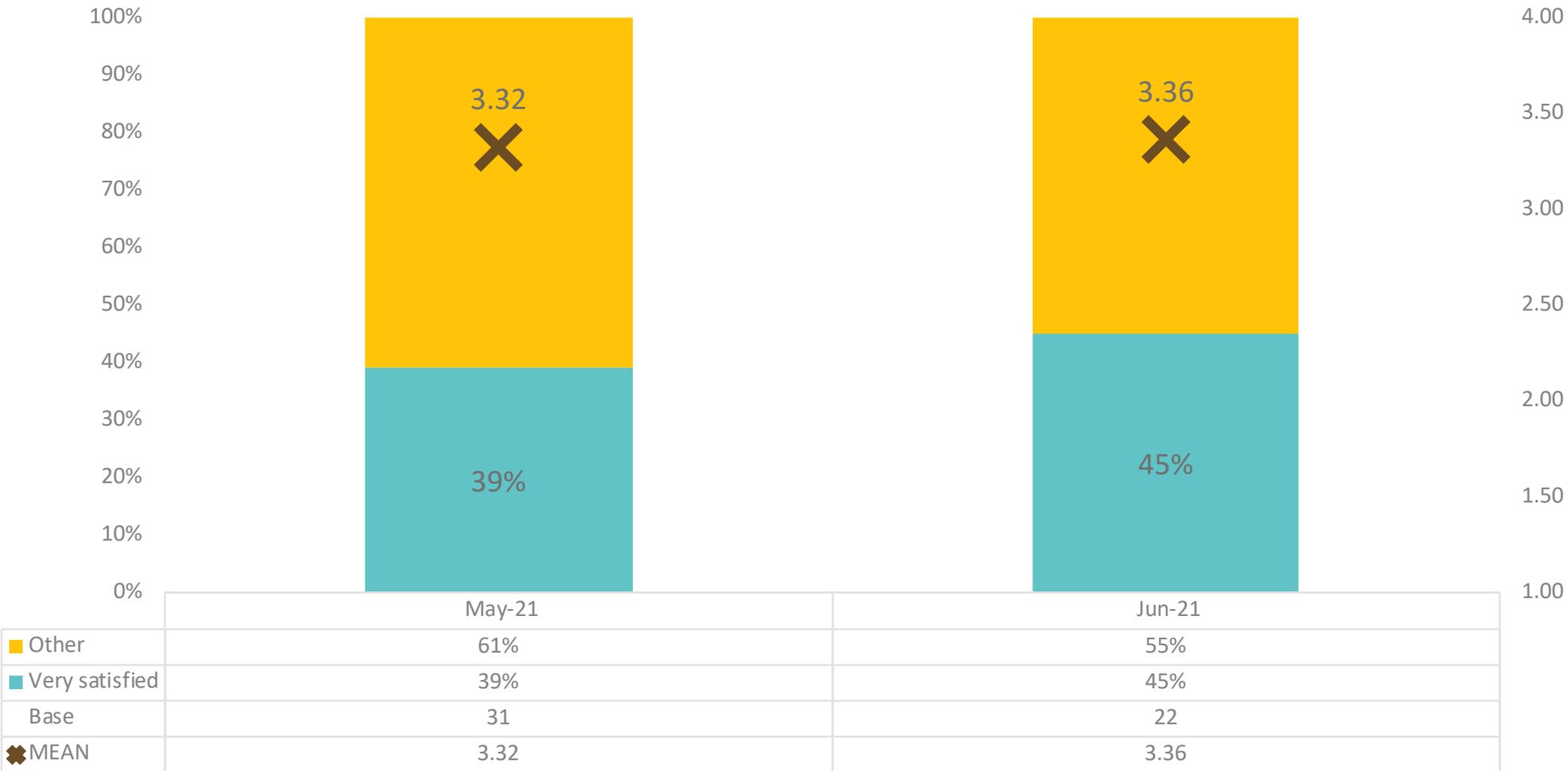
# TRANSPORTATION OPTIONS – SATISFACTION

## 4PT RATING SCALE



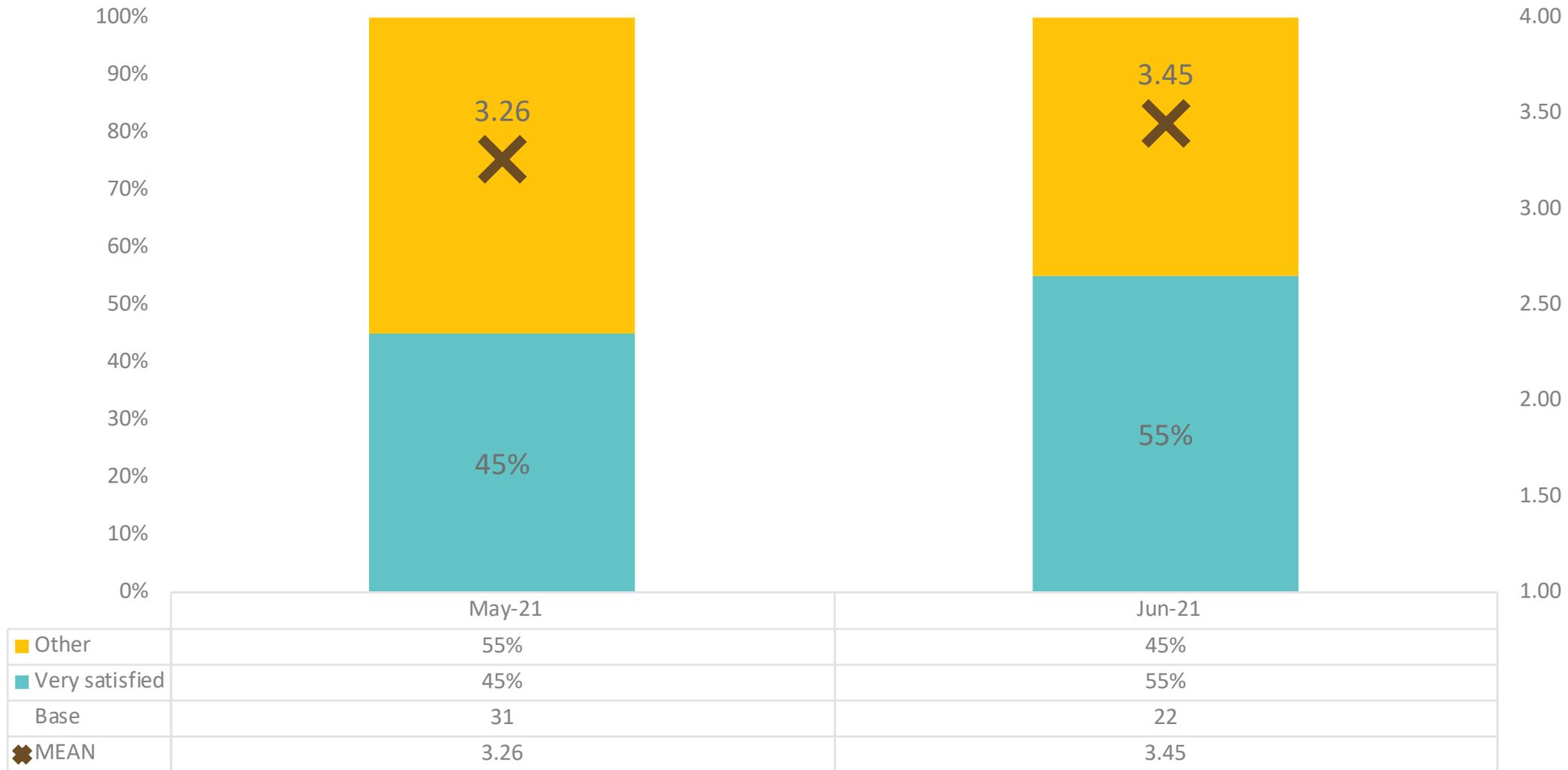
# VISITORS FEEL WELCOME – SATISFACTION

## 4PT RATING SCALE



# VARIETY OF ACTIVITIES – SATISFACTION

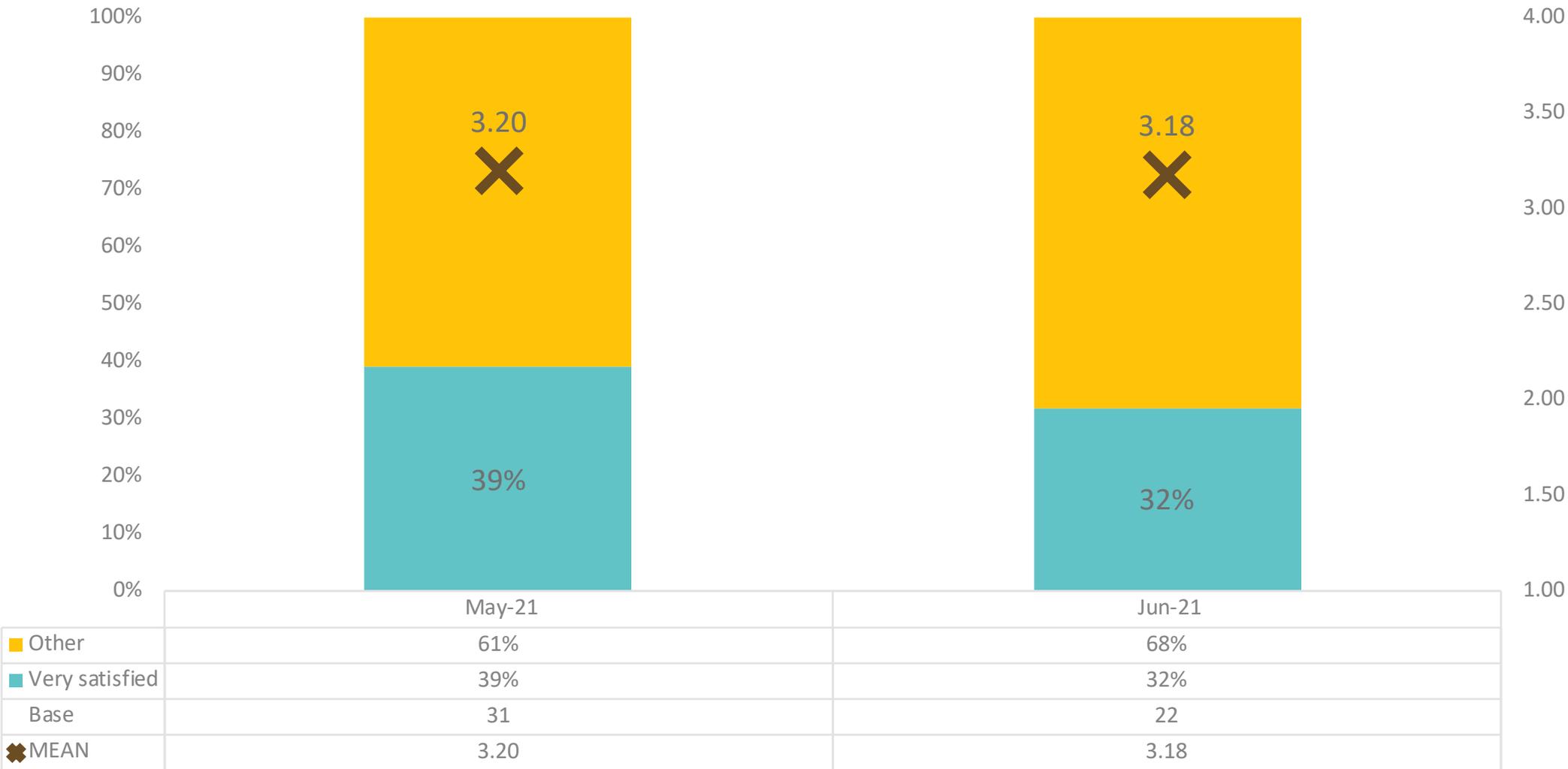
## 4PT RATING SCALE



Caution  
small  
base

# SHOPPING OPTIONS – SATISFACTION

## 4PT RATING SCALE

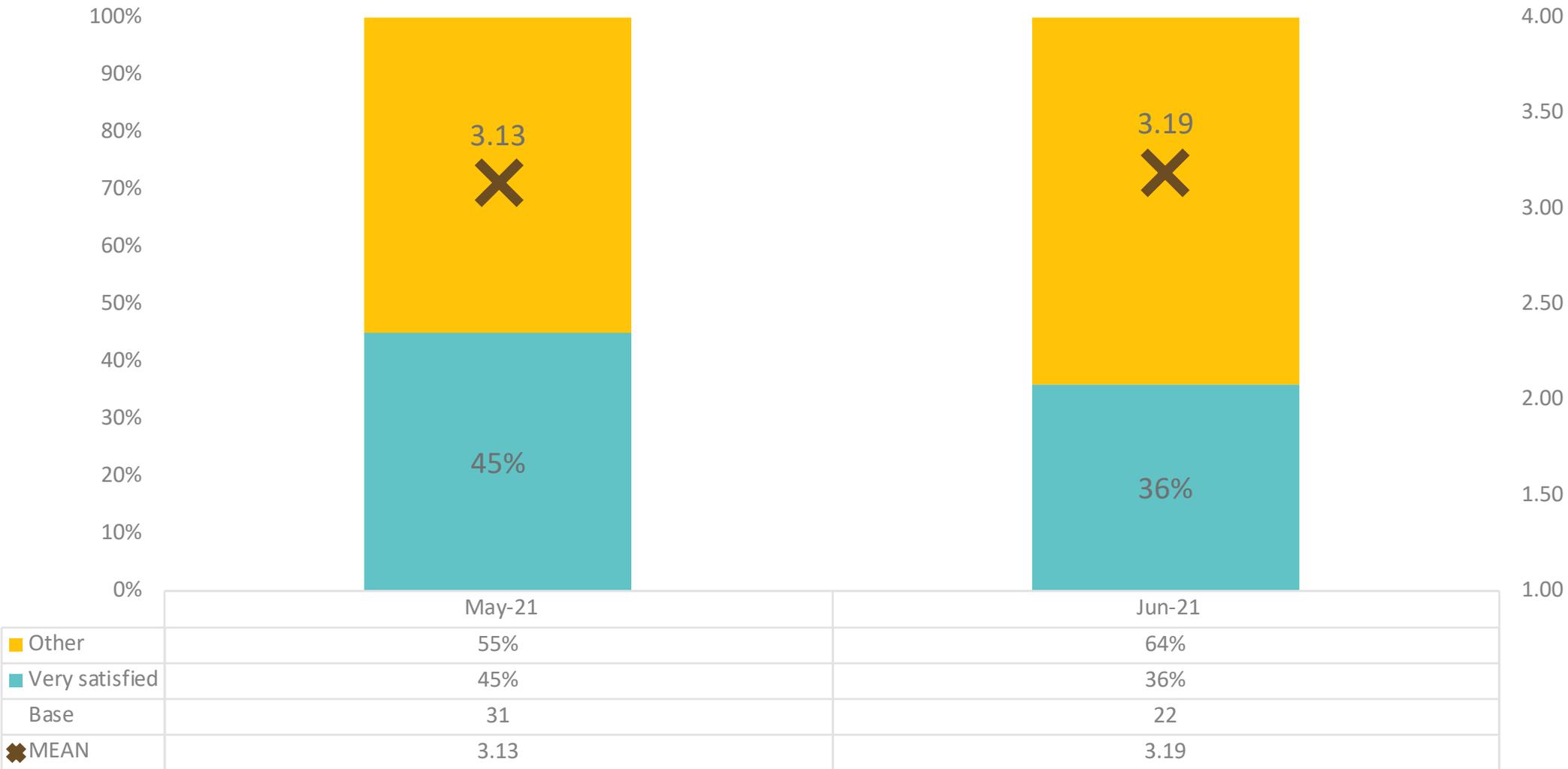


Caution  
small  
base



# OVERALL VALUE – SATISFACTION

## 4PT RATING SCALE



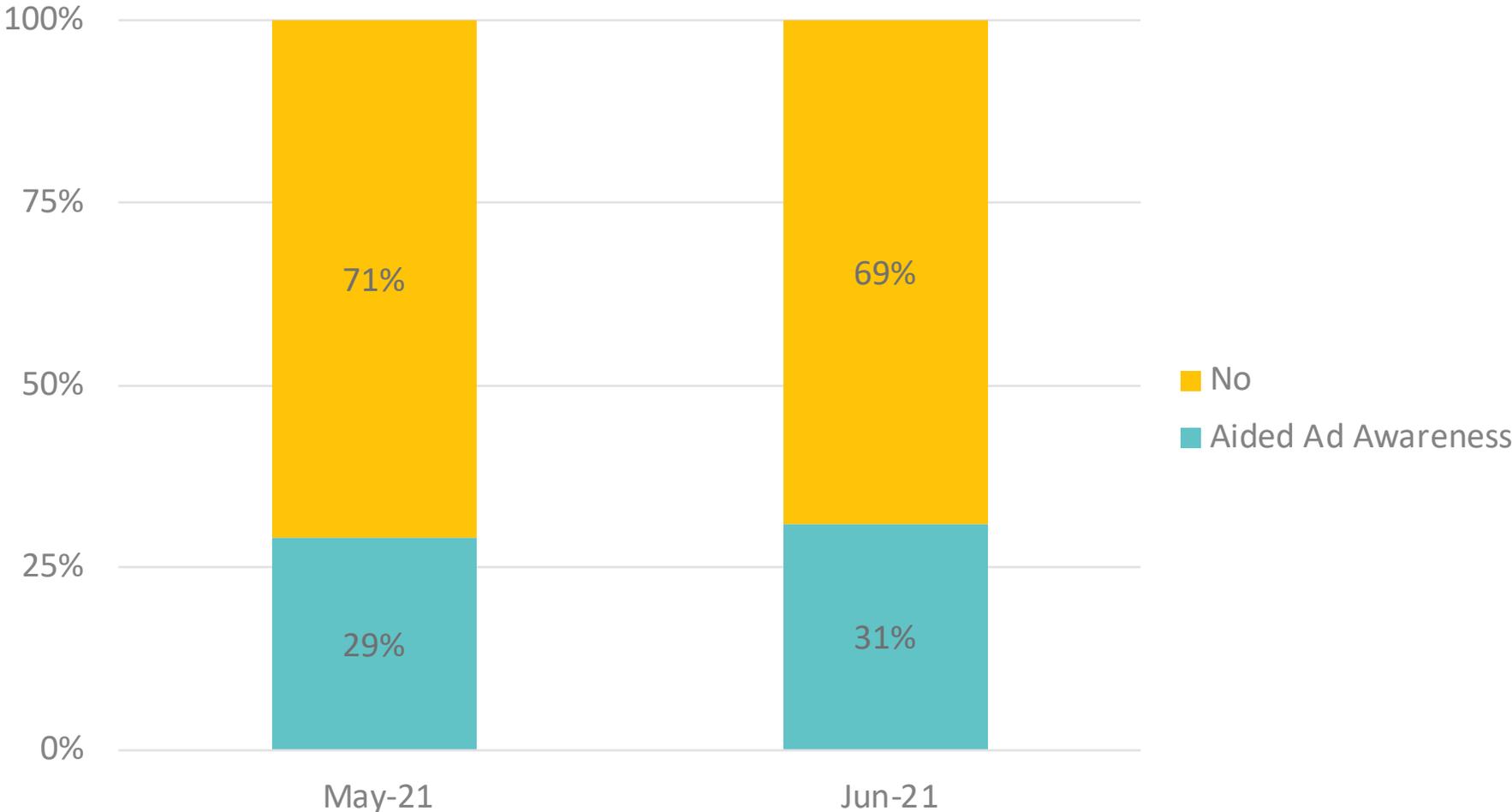


SECTION 4

# MARKETING & COMMUNICATIONS



# AIDED ADVERTISING AWARENESS



# SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021
BASE	31	22
<i>Travel guide website</i>	29%	32%
<i>Social media</i>	29%	23%
<i>Television</i>	19%	9%
<i>Recommendations – friends/ family</i>	10%	18%
<i>GVB website</i>	10%	9%
<i>Travel agent</i>	3%	5%
<i>Radio</i>	-	5%





SECTION 5

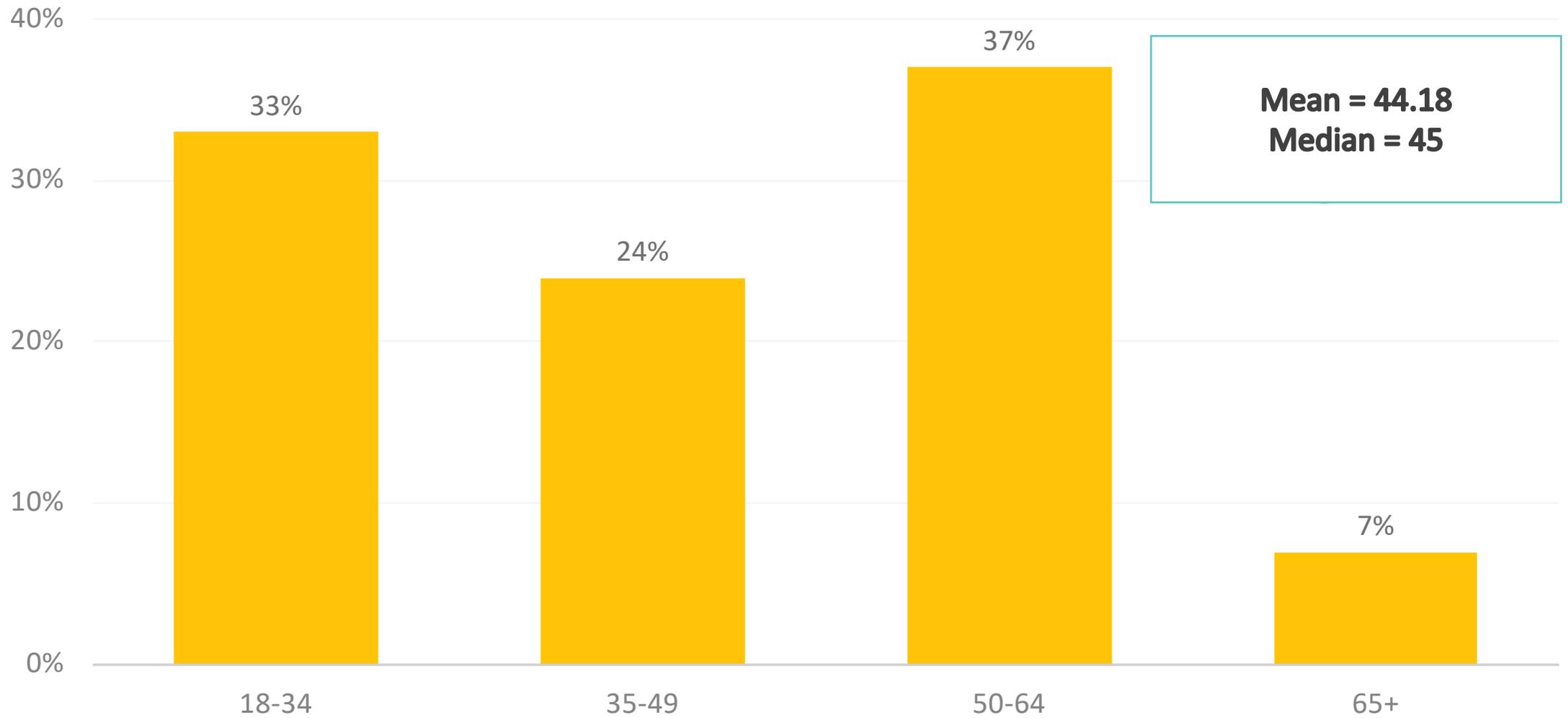
# PROFILE OF RESPONDENTS



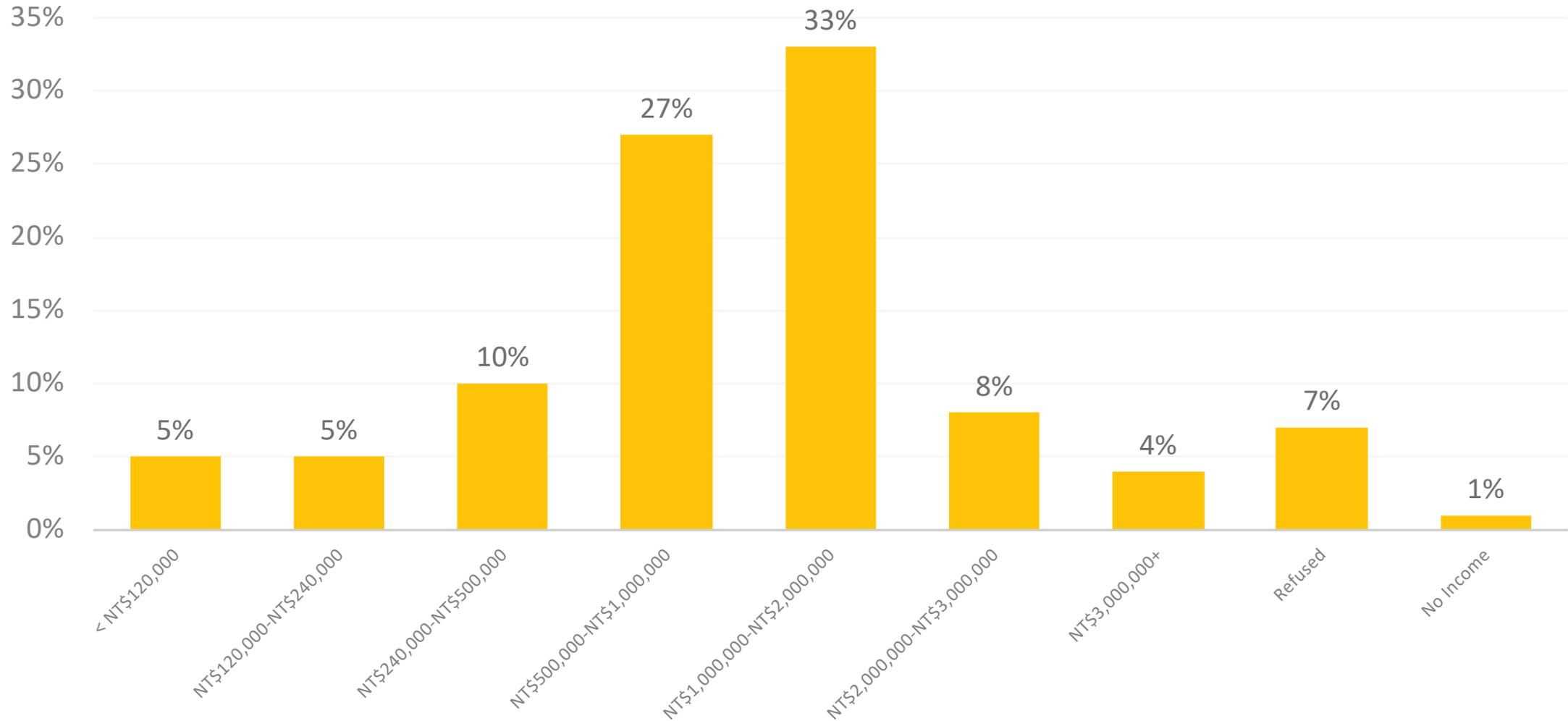
# GENDER



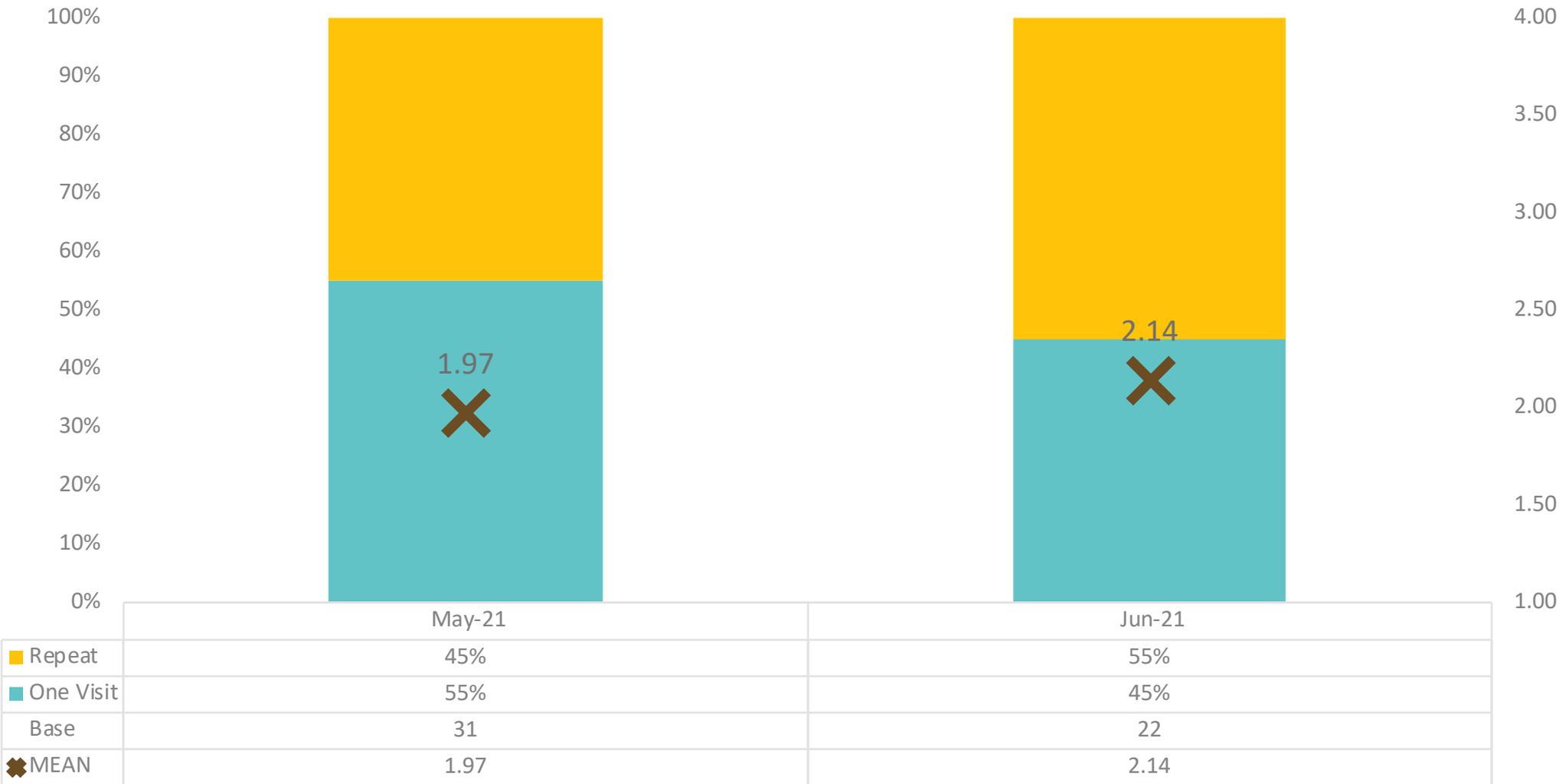
# AGE



# HOUSEHOLD INCOME



# TRIPS TO GUAM



# INTERNATIONAL TRAVEL – Trips in last five years

